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ABSTRACT

The report describes the first 3 years of the Homecoming Project, which was designed to return disabled students in regional special education programs to regular classes in 26 local Vermont schools. Fifty-eight such students (of whom 45% were moderately or severely handicapped) were transitioned into regular classes and 19 other students at risk for such placement were maintained in regular education environments. The program model stresses "shared ownership" among regular and special educators and makes use of a local planning team and the consultative services of education specialists. The first chapter provides an overview of the project followed by a chapter which discusses essential ingredients for successful implementation of the model including administrative and instructional staff commitment, team process, and planning. Fifteen steps in the team planning process are outlined in the third chapter. The next chapter looks at the cooperative teaming process, stressing the need to develop positive interdependence, practice collaborative skills, and monitor and discuss team member performance. Characteristics of the educational specialist and three consultation models are discussed next. The final chapter identifies issues related to implementation of the Homecoming model including reasons for local school placement. Among six appendixes are a parent inventory and a survival skills checklist. (DB)

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# THE HOMECOMING MODEL:

## Educating Students Who Present Intensive Educational Challenges Within Regular Education Environments

## A Guide for Establishing Shared Responsibility Among Teachers, Administrators and Parents for the Education of Students Who Present Intensive Educational Challenges

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# FORWARD

Madeleine C. Will
Assistant Secretary for the Office of Special Education and Rehabilitative Services

U. S. Department of Education

A singular challenge facing education today is the challenge of providing the best, most effective education possible for children and youth with learning problems. Over the past two decades there has been a proliferation of legislation and federally funded "special", "compensatory", and "remedial" education programs designed to ensure educational success for these students.

These programs were designed with the best of motivations, and it is fair to state: to make achievement and academic growth possible for America's students. Each of the programs has contributed significantly to this stated goal... Yet, the **complete** fulfillment of the goal eludes us. In reality, the reviews of these separate special systems submitted by parents, teachers, and administrators say clearly: Programs have achieved mixed results for some children. And one explanation for mixed reviews is the special nature of our programs... At the heart of the special approach is the presumption that students with learning problems cannot be effectively taught in regular education programs even with a variety of support services.

What can be done to create the vision we have of improving educational outcomes for children and youth with specific learning needs?

One thing that can be accomplished is reform at the building level. Building-level administrators often cannot mold all the resources in their building to produce effective programs. Special programs can prevent this. Building-level administrators must be empowered to assemble appropriate professional and other resources for delivering effective, coordinated, comprehensive services for all students based on individual educational needs rather than eligibility for special programs. This means **special programs and regular education programs must be allowed to collectively contribute skills and resources to carry out individualized education plans based on individualized education needs...** It means the nurturing of a shared commitment to the future of all children with special learning needs.

Excerpts from: Will, M. (1986). Educating Children with Learning Problems: A Shared Responsibility. Exceptional Children, 52(6), 411-415.

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# CHAPTER 1

*This chapter provides a description of the Homecoming Project, an overview of the model, and a detailed example of the local planning team at work.*

## An Overview of the Homecoming Model

Historically, students presenting intensive educational challenges to our public schools have been served outside of the regular classroom and, in many cases, outside of their local public school. This guide describes the **Homecoming** model that was developed through an OSEP, DID demonstration project to assist teachers, related service providers and administrators to educate all of their students within the least restrictive environment provided by the local public school. The model has enabled participating Vermont school districts to integrate students who present some of the most intensive educational challenges within regular classrooms.

As used here, the phrase "students who present intensive educational challenges" refers to those students who have been excluded from the regular classroom in their local school, or are "at risk" of being excluded. These students have been described for special education eligibility as mildly, moderately or severely retarded, multihandicapped, deaf-blind, autistic, behaviorally disordered or emotionally disturbed.

## The Homecoming Project

For the past three years, the staff of the **Homecoming** Project, along with the administration and instructional staff of 26 local schools, have developed, field-tested and evaluated a model to bring "home" students from regional special education programs and prevent other students from ever being placed in them. The model includes transitioning students from early childhood/ special education programs to local kindergartens upon reaching school age. This model has been adopted by, and is fully operational in four supervisory unions across Vermont.

A total of 77 students, ranging in age from 5 to 17 years, benefited from the **Homecoming** model. Of these students, 58 have been transitioned from regional special educational programs to regular classrooms in their local schools. An additional 19 students who were at risk of being placed in self-contained special classes or out-of-district programs continue to be maintained within regular education environments of their local schools. Characteristics of the 58 students transitioned to local school regular classroom placements are presented in Table 1.

**TABLE 1** STUDENTS WHO TRANSITIONED TO REGULAR CLASSROOM PLACEMENTS (n=58)

- 45 % were transitioned from early childhood/ special education programs
- 55 % were transitioned from school-aged regional special class programs
- 55 % were mildly handicapped
- 45 % were moderately or severely handicapped
- 76 % were aged 5 to 11 (elementary school)
- 16 % were aged 12 to 14 (junior high school)
- 8 % were 15 to 22 (high school)
- 16 % were part-time placements (one or two days per week)
- 84 % were full-time placements in the local school
- 100 % currently remain in their local school

As noted in Table 1, a large percentage (45%) of the total number of students who transitioned from regional programs to regular class placements in local schools were students with moderate or severe handicaps. To date, all of the 58 students who transitioned from regional programs to local schools have remained in their local school placements, avoiding re-referral to out-of-school placements.

## The Homecoming Model

The **Homecoming** model is based upon the concept of "shared ownership" among regular and special educators for the education of challenging students within regular classrooms in local public schools. The **Homecoming** model utilizes a building-based planning team and a consultative approach to deliver special education and related services to challenging students.

### Component 1: The Local Planning Team.

The goal of the local planning team is to develop and support the implementation of a plan which will enable students who present intensive challenges to the local school system to be educated within regular education environments. The local planning team performs two major functions in this regard. One function is to develop educational plans to transition to regular classroom placements students from placements outside of regular education environments (e.g., regional special education programs, early childhood/special education programs, special classes within the local school). The second function is to provide support to local school staff to maintain challenging students within regular classroom placements. This support is provided through the team's development of plans which address challenging students' current learning and behavior problems and plans for transitioning students to next grade placements.

Responsibilities of the local planning team include the identification and allocation of existing local resources (both human and material); the identification of needed additional resources; the development of curricular modifications and physical accommodations within classrooms; and, the identification and arrangement of inservice training, technical assistance and follow-up for local school personnel.

The **Homecoming** model calls for the formation of a "core" planning team in each school within a school district. This core planning team is comprised of a cross-section of the school's instructional staff, (e.g., first grade teacher, fourth grade teacher, resource room teacher, speech pathologist and the school principal). Elementary and middle school (or junior high school) core planning teams should have a minimum of three members - a regular educator, a special educator and an administrator. Secondary school core planning teams also will include a vocational educator. Core planning team members need to be energetic, enthusiastic and creative individuals who are highly competent and respected by their colleagues. Furthermore, they must hold a strong belief in the planning team's goal of educating all children in local school regular education environments.

The core planning team draws additional membership from the pool of available local staff members and consultants, as the need arises for individual students. It is quite likely that each and every staff member of the local school will join the core planning team, at one time or another, to plan for an individual student. For example, if the team is planning for a student's transition from first to second grade, the core planning team would expand to include all of the student's potential second grade teachers as well as the student's parents and current first grade teacher. Depending upon the student's specific educational needs, consultants with particular specialties (e.g., physical therapist, behavior management specialist) also may be added to the team. Thus, for each individual student, the local planning team will be comprised of the core team plus the additional members identified as critical to the education of the student within the local school.

Local planning teams employ principles of "collaborative teaming" to operate effectively and efficiently and to develop the sense of shared ownership for students among school staff. Collaborative teaming principles prescribe the behaviors of a "good team member"; the roles (i.e., timekeeper, recorder, facilitator, monitor) played by team members to insure the sharing of leadership responsibilities; and, a structured method for assessing and setting goals to improve the group's success in functioning as a cohesive team.

## Component 2: The Educational Specialist and the Consultation Model.

Equal in importance to the existence of local planning teams is the availability of consultative services from a professional with extensive background and experience in developing integrated educational programs for students presenting intensive educational challenges. This consulting professional, the Educational Specialist (ES), provides in-service training, consultation and technical assistance to the local planning team, and other school staff. The ES employs a consultative approach to assist local planning teams in arranging for services for the challenging students within a school district.

## An Example- Johnny Goes to School

The following example is intended to illustrate the roles and responsibilities of the local planning team and the ES as they jointly implement the **Homecoming** model for a student transitioning from an early childhood/special education program to a public school kindergarten. Although the characters and settings are fictional, the activities and decisions represented are from actual local planning team experiences. The forms and assessment instruments which were used by the team in this example are intended to be modified to suit the needs and preferences of individual planning teams and schools.

In February of 1986, a referral was received by the core planning team at Rural Elementary School. The core planning team in this school included the principal, one 1st grade teacher, one 6th grade teacher, the learning specialist/ consulting teacher, and the speech pathologist.

The referral was from the regional Essential Early Education (EEE) program and indicated that a 5 year old student, Johnny B., would "age-out" of the program in June of 1986 and his parents would like him to enter kindergarten at Rural Elementary in the Fall. The referral also indicated that Johnny very likely would need support from a speech pathologist and a learning specialist/ consulting teacher.

After reviewing the referral, the team identified new members to be added to the team for the purpose of developing a transition plan for Johnny. The core team was expanded to include the sending EEE teacher, two potential receiving teachers at the kindergarten level and Johnny's parents.

The core planning team next identified a case manager for Johnny's transition plan. It was decided that Ms. Paul, the local learning specialist/ consulting teacher, would act as Case Manager. As the case manager, Ms. Paul had the responsibility of inviting the additional planning team members to join the team, setting the date for the first full team meeting, and arranging for various activities to be carried out prior to the first team meeting. The core planning team decided, at the time of referral, that the first full team meeting should be devoted to accomplishing three major objectives: (a) to learn about Johnny; (b) to learn about potential kindergarten placements within Rural Elementary School; and (c) to identify needed expertise for accomplishing the task of transition planning and follow-up.

### Team Activities Prior to First Meeting

To meet these objectives, each team member conducted information gathering "homework" assignments prior to the first meeting. The EEE teacher (sending teacher) was asked to summarize Johnny's progress on his current programs and to identify his major strengths and current educational needs across curriculum areas (refer to **Figure 1**).

Given information provided by the two kindergarten teachers, she also indicated Johnny's level of independence on select learning and social skills important for independent functioning in regular education environments indicated in a Survival Skills Checklist (**Figure 2**).

Finally, the EEE teacher completed a Schedule, appearing in **Figure 3**,

indicating Johnny's current classroom activities, the location of the activities, the educational arrangements, any adaptations to the activity, and the educational needs addressed by the activity.

The two kindergarten teachers on the team listed their typical daily class activities along with the location, classroom arrangement and materials for each activity (**see Figure 4**).

As the case manager, Ms. Paul contacted Johnny's parents and arranged to visit them at home to explain the transition process and objectives and to complete a Parent Inventory (**refer to Appendix A**) which assesses the family's preferences regarding skills to be taught in the next school year, the parent-teacher communication system and any family support needs. She further encouraged Johnny's parents to attend the planning team meetings, emphasizing how valuable their suggestions would be in developing the best transition plan for Johnny. They also were encouraged to bring a friend or advocate along with them for support.

Ms. Paul also arranged to visit and observe Johnny's EEE classroom.

## The First Full Planning Team Meeting

By the first full planning team meeting, the above activities were completed. The information gathered provided every team member with an understanding of Johnny's current skills and program, as well as the expectations of the two kindergarten classrooms. Given this information, the team decided that Johnny had curricular needs which were outside the expertise of the local staff. Johnny needed instruction in basic dressing skills (e.g., putting on coat, zipping, putting on shoes and socks), and rudimentary communication skills (e.g., following simple directions, speaking in two and three word utterances, expressing his needs, making choices, developing simple concepts). Team members realized that the EEE teacher who had expertise in these areas, was available to help them plan for next year and to develop a schedule for Johnny. However, they were concerned about follow-up, technical assistance and training during the coming year.

The team then began discussing the kindergarten curriculum and the activities of each classroom (refer to **Figure 5**). For each activity, the team discussed whether Johnny could take part in and would benefit from the activity. They also discussed whether extra assistance or adaptations (e.g., curriculum adaptations, materials adaptations) were needed to enable Johnny to participate in the activity. Possible adaptations were then identified and listed before moving on to discuss the next activity. Activities that were determined to be of little educational or social benefit to Johnny were rejected as components of Johnny's daily schedule.

Once all activities of both kindergarten classrooms were reviewed, alternative activities were discussed which would be necessary to ensure instruction on IEP objectives during the coming year. Those activities would then be arranged to fit into Johnny's schedule during times that he was not engaged in kindergarten activities with the rest of the class.

After one hour, the agreed upon time limit for this first meeting, the team reviewed what it had accomplished and set the agenda for the next meeting. It was decided that the team would select a kindergarten classroom for next year, and would begin to develop a schedule for Johnny. The school principal also agreed to call the special education administrator and explore the technical assistance and other support options available to aide them to provide Johnny with an appropriate educational program at Rural School.

The next day the principal called the special education administrator and found that necessary expertise was available to provide the Rural School staff with consultation and support. The supervisory union employed an educational specialist (ES) whose role was to consult with teams in the local schools. The ES was available to all of the local school planning teams to assist them in developing, implementing and monitoring the educational plans of the more difficult to teach students. The special education administrator agreed to contact the ES and arrange for her to attend the next team meeting concerning Johnny.

## The Second Meeting

At the second meeting the ES joined the team. After a quick review of the minutes of the first meeting the ES explained her position and relationship to the team for the coming year. The ES explained that she was a district-wide employee whose responsibility was to assist local teams to develop appropriate educational programs for students with challenging educational needs. She was available to join Johnny's team and would continue not just for next year, but throughout Johnny's school career or until the team felt her assistance was no longer needed. She could assist the team in developing specific instructional programs for Johnny, training direct instructional staff to implement instructional programs, provide instructional materials and curricular resources to local school staff, and she could provide inservice training on specific topics related to the education of students with challenging educational needs. She further emphasized that she was not there to direct the planning team, she was there to assist. The team should continue to function as before, with her specific involvement depending upon the decisions of the team.

The team next turned to the topic of selecting a classroom placement for Johnny. After reviewing the demands of the kindergarten activities and expectations in relation to Johnny's educational and social needs, the team agreed that a kindergarten placement was the preferred placement for the coming school year. Both kindergarten teachers at Rural School were appropriate for Johnny, both teachers were enthusiastic about having Johnny in their class, and both offered a variety of activities in which Johnny could participate. After some discussion, the team decided that Johnny would be placed in Ms. Scott's kindergarten class. The other kindergarten teacher agreed to remain on the team to assist with planning any needed curriculum modifications or providing other support to Ms. Scott. She also suggested that her class size be increased by two students in order to lighten Ms. Scott's class load in compensation for the extra planning and instructional time that Johnny might require. The team also recommended that the principal assign one of the classroom aides available to the elementary school to Ms. Scott's classroom for one hour each day to help her implement Johnny's IEP objectives.

The remainder of the allotted meeting time was spent planning Johnny's kindergarten schedule (**see Figure 6**) and setting the agenda for the next meeting. The third meeting would be devoted to identifying needed transition activities, developing a plan for parent/school communication, and developing a schedule of the ES's follow-up, technical assistance and training activities for the following year.

## The Third Meeting

At the third and final meeting of the year it was decided that Ms. Scott, Johnny's kindergarten teacher, would have primary responsibility for communicating with Johnny's parents. Ms. Scott would call Johnny's parents each Friday afternoon to discuss Johnny's school progress. Johnny's parents also agreed to remain on the transition team and attend team meetings in the Fall.

The team also felt that additional activities were needed to facilitate entrance into kindergarten. First, the ES would visit the EEE classroom several times prior to the end of the current school year to get to know Johnny and his current programs. Second, the ES and Ms. Scott, Johnny's kindergarten teacher, would visit Johnny and his parents the week before school opened in the Fall to review the plan and to determine if any concerns had developed over the summer that should be addressed during the first Fall team meeting. Third, Johnny and his EEE teacher would visit Ms. Scott's kindergarten classroom before school closed for the summer so that he could meet his new teacher and see where he would be going to school.

Finally, it was decided that the ES would work with the learning specialist/consulting teacher and the speech pathologist to develop specific educational programs for Johnny. The ES would also arrange to visit Ms. Scott's

kindergarten class during the first week of school to train the classroom aide on program implementation and to help problem solve unexpected problems.

The team meeting ended with the team agreeing to meet at the end of the first week of school to review Johnny's program and to decide upon a meeting schedule for the year.

Johnny successfully transitioned into Ms. Scott's kindergarten classroom at Rural Elementary School in the Fall. He is making adequate progress and has been accepted by his peers. The planning team's next challenge is to plan for Johnny's transition from kindergarten into the first grade.

## Benefits of the Homecoming Model

As already indicated, 26 schools have successfully implemented the Homecoming model to educate within regular education environments 77 students presenting intensive challenges. The composition of planning teams at the secondary level are quite different from the compositions of elementary teams (e.g., one secondary planning team had 15 members representing various academic disciplines, physical education, guidance, the area vocational program and special services). The roles and responsibilities of the teams, however, remain the same. And, although not all teams have been equally collaborative or successful in accommodating every team member's desires, all local teams have demonstrated that they can support the integration of students presenting challenges into regular education environments.

The potential benefits of the **Homecoming** model are many. Students who present intensive educational challenges to their local schools will benefit from the collaborative planning of parents, regular and special educators, and administrators through increased opportunities for integrated educational and social experiences within regular education environments. Aside from the obvious benefits to all children of being afforded the opportunity to attend their neighborhood schools, there are benefits to teachers, parents and administrators.

In the participating Vermont school districts, teachers collaborating to integrate students report that: (a) they have more say in what local educational programs look like; (b) they feel more comfortable asking for and receiving the material, technical and emotional support from colleagues to educate more challenging students; and, (c) the unique expertise of both the regular and special educators in the building are more readily discovered and used. Parents report enhanced levels of participation in local school activities and in the planning of their children's education. Finally, administrators report more efficient use of resources; savings to the school district through the reduction of duplicated services; and increased understanding and support among administrators, regular class teachers, special educators, related services personnel, and families of one another's roles and needs. In the chapters which follow, the **Homecoming** model is more fully delineated. The composition and potential functions of a local planning team are defined; steps which teams may follow in planning for local integrated education options are outlined; and methods for developing local educational resources and gaining access to specialized expertise are identified. A final chapter also has been added which identifies some of the major issues faced by administrators, special educators, teachers, and parents during model development and implementation in the participating schools. ■

Figure 1.
Student Skill
Summary

| LearningBehaviors /Survival Skills | Academics | Self-Care | Motor |
|---|---|---|---|
| **major strengths:**<br><br>• Follows class rules<br>• Does not disrupt peers<br>• Stays on task<br>• Waits turn<br>• Initiates contact with peers<br>• Secures attention appropriately | **major strengths:**<br><br>• Counts to 5<br>• Sorts by color, shape<br>• Recognizes written names of classmates<br>• Traces own first name<br>• Labels common pictures (e.g. ball, cat, dog) | **major strengths:**<br><br>• Toileting<br>• Feeding<br>• Undressing<br>• Washes hands<br>• Brushes teeth | **major strengths:**<br><br>• At age level |
| **major needs:** | **major needs:** | **major needs:** | **major needs:** |
| • Direction following<br>• Beginning work without extra direction<br>• Asking for help or information<br>• Making choices or indicating preferences | • One-to-one correspondence<br>• Writes name<br>• Sequencing items & events<br>• Letter sounds | • Dressing skills need refinement:<br>• putting on coat<br>• zipping<br>• putting on shoes and socks | |

| Community Skills | Communication | General Information | Social |
|---|---|---|---|
| **major strengths:**<br>• At age level | **major strengths:**<br>• Imitative<br>• Knows most object labels<br>• Good compre-hensive skills<br>• Follows some simple directions | **major strengths:**<br>• Knows name<br>• Knows town of residence | **major strengths:**<br>• Very friendly<br>• Plays with other students<br>• Shows toys<br>• Respects others property |
| **major needs:** | **major needs:** | **major needs:** | **major needs:** |
| | • Increase number of directions he will follow<br>• Increase length of utterance<br>• Increase words & objectives<br>• Increase spontaneous requesting<br>• Relational concepts<br>• Ask questions<br>• Ask for help | • Address<br>• Phone number | • Increased language |

## Figure 2. Survival Skill Checklist

**EEE Teacher:** Ms. King
**Kindergarten Teacher:** Ms. Scott
**School:** Rural Elementary
**Class/Grade:** Kindergarten

**Directions for next grade teacher:**

For each skill listed, **X** whether the skill is expected of the majority of your students at the beginning of the school year, **O** those skills which are critical for success.

If there are OTHER skills not listed here that you feel are important, write them in the additional spaces provided.

**Directions for current teacher:**

Using the scoring system indicated in the KEY above, rate the learner's skill level for each of the 25 listed skills.

**KEY:**
I = Independent
P = NeedsPrompting
O = Cannot Do

A. Expected at beginning of the year.
B. Skill level of learner.

| SKILLS: | A | B |
|---|---|---|
| 1. Begins work within an appropriate time without extra teacher direction. | | P |
| 2. Stays on task without extra teacher direction. | | I |
| 3. Completes tasks within alloted time. | | P |
| 4. Does not disrupt peers. | | |
| 5. Participates and/or follows task directions in a group. | X | P |
| 6. Answers teacher's questions while in group. | | P |
| 7. Participates at appropriate time (e..g., waits for turn, waits to be recognized in a group). | X | |
| 8. Locates materials and replaces or puts them in order when finished. | X | P |
| 9. Follows general rules and routines established in classroom. | X | P |
| 10. Compiles with simple directions. | X | P |
| 11. Follows 2-step directions. | | O |
| 12. Follows 3-step directions. | | O |
| 13. Follows directions provided at a previous time. | | |
| 14. Follows directions provided to the group. | X | P |
| 15. Engages in social/recreational activities at appropriate time. | X | I |
| 16. Initiates contact with peers. | X | I |
| 17. Follows rules established by a group. | X | I |

| | | |
|---|---|---|
| 18. Shares, exchanges materials. | X | I |
| 19. Settles minor disputes with peers. | | P |
| 20. Maintains social/recreational activity with peers for appropriate length of time. | X | I |

| | | |
|---|---|---|
| 21. Secures teacher/peer attention appropriately. | X | I |
| 22. Asks for help, information or feedback. | X | P |
| 23. Gives feedback to others, (comments on peers action or products). | | O |

| | | |
|---|---|---|
| 24. Makes a choice or indicates a preference. | | P |
| 25. Other: _____ | | |
| _____ | | |
| _____ | | |

## Priority Skills in Need of Instruction

1. Simple directions
2. Asking for help
3. Making a choice

## Adaptations for Participation

1. Buddy to assist in following group directions
2.
3.

Figure 3.
Daily Schedule

Student: Johnny B.
Date: February 1986

| Time | Survival Skills & Educational Program Needs To Be Addressed* | Activity | Location |
|---|---|---|---|
| 8:30 - 9:00 | - Follows simple directions<br>- Answers questions<br>- Asks questions<br>- Sequence days of week<br>- Concepts pertaining to time, weather, calendar | Circle<br>- calendar<br>- weather<br>-"good morning"<br>- name recognition | EEE Classroom |
| 9:00 - 9:30 | Language concepts<br>-vocabulary | Language Group | EEE Classroom |
| 9:30 - 10:00 | Academics<br>- write name<br>- sets<br>- one-to-one correspondence | Academics | EEE Classroom |
| 10:00 - 10:30 | Language concepts<br>- requesting<br>- direction following | Gross Motor | School gym |
| 10:30 - 10:50 | Requesting | Snack | EEE Classroom |
| 10:50-11:10 | - Put on coat<br>- Zip coat<br>- Put on shoes/boots | Clean-up and go home | EEE Classroom |

*Code programs that appear as IEP objectives. (There must be a minimum of 4 for a homecoming day.)

| Person Responsible | Educational Arrangement and Adaptations | Functional Materials |
|---|---|---|
| Ms. King<br>(EEE Teacher) | Large group (12 students): sitting on floor in semi-circle; teacher directed | -Calendar<br>-Felt board<br>-Name cards |
| Mr. Foote<br>(Speech and Language) | Small group (5 students): at table; teacher directed | -Language cards<br>-Photographs<br>-Study books |
| Ms. King | Small groups: independent or teacher directed | Related to specific activity |
| Ms. King | Large group: teacher directed | -Gym equipment |
| Ms. King/Mr. Foote | Large group: at tables; teacher directed | -none |
| Mr. King | One-to-one | -Coats |

Figure 4.
Daily Schedule
Kindergarten

**Grade:** Kindergarten
**Teacher:** Ms. Scott
**Date:** February 1986
**School:** Rural Elementary

| Time: | Activity: | Location: | Arrangement | Materials: |
|---|---|---|---|---|
| 8:30-9 :00 | Circle | Classroom | Large group | • calendar<br>• name cards<br>• Show and tell items |
| 9:00-9:30 | Academics<br>• letter recognition | Classroom | Large group-Independent Work | • Worksheet |
| 9:30-10:00 | Free Play | Classroom | | |
| 10:00-10:30 | Academics<br>• math | Classroom | Large group-independent work | • Worksheets |
| 10:30-11:15 | • Crafts<br>• Snack<br>• Clean-up<br>• Go home | Classroom | Small groups | Depends on activity |

Figure 5.
Classroom Activity
Analysis Worksheet

| Classroom Activities | | | Appropriate for the Student? | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Activity | Pers. Resp. | Location/ Activity | As Is | | w/adapted materials | | w/adapted curr./goals | | w/personal assistance | | Specific Adaptations |
| | | | YES | NO | YES | NO | YES | NO | YES | NO | |
| Circle | Teacher | Classroom Large Group | | | | | X | | | | Integrate direction following program, relational concepts + strategy for increasing length of utterance into circle time. |
| Academics (letter recognition) | Teacher | Classroom Independent Work | | | X | | X | | X | | Aide: Work one-to-one during independent work time. |
| Free Play | Teacher | Classroom | X | | | | | | | | |
| Math | Teacher | Classroom Large Group Independent Work | | | X | | X | | | | Math concepts at appropriate levels. |
| Crafts | Teacher | Classroom Large Group Independent | | | | | X | | | | Integrate direction following into activity. |
| Snack | Teacher | Classroom Large Group | X | | | | | | | | |
| Clean-Up | Teacher | Classroom | | | | | X | | X | | Aide: One-to-one dressing program. |

| Alternative Activities for Students | | | | Skills in Need of Training |
|---|---|---|---|---|
| Activity | Location/Grouping | Pers. Resp. | Materials | |
| | | | | |

Figure 6.
Daily Schedule
Kindergarden

Student: Johnny B.
Date: February 1986

| Time | Survival Skills & Educational Program Needs To Be Addressed* | Activity | Location |
|---|---|---|---|
| 8:30 - 9:00 | • Following directions<br>• Length of attendance<br>• Ask questions<br>• Increase language<br>• Concepts pertaining to calendar | Circle-<br>• calendar<br>• Special events/general discussion (show & tell) | Classroom |
| 9:00 - 9:30 | • Following directions<br>• Write name<br>• Recognize phone number & address<br>• Letter sounds<br>• Letter recognition<br>• Beginning work independently | Academics (letter/language) | Classroom |
| 9:30 - 10:00 | • Language skills | Free play | Classroom or playground |
| 10:00 - 10:30 | • One-to-one correspondense<br>• Count past 5<br>• Beginning work<br>• Ask for help<br>• Sequencing times | Academics (Math) | Classroom |
| 10:30 - 11:00 | •Spontaneous requesting<br>• Making choices<br>• Indicate preference<br>• Asking help | Snack/Crafts | Classroom |
| 11:00-11:15 | • Put on coat<br>• Zip coat<br>• Put on shoes/boots | Clean-up<br>Go home | Classroom |

*Code programs that appear as IEP objectives. (There must be a minimum of 4 for a homecoming day.)

| Person Responsible | Educational Arrangement and Adaptations | Functional Materials |
|---|---|---|
| Ms. Scott | Large group: sitting in circle; teacher directed | • Calendar |
| Aide | One-to-one instruction | Related to specific act |
| Teacher | Free time with peers | -none |
| Teacher | Small groups: teacher directed | • Worksheets |
| Teacher | Large group: teacher directed | Related to specific activity |
| Aide | One-to-one | •Coats<br>•Bag<br>•Boots<br>•Hat |

# CHAPTER 2

*An indepth description of the local planning team and consultation model.*

## Administrative Commitment

## Essential Ingredients to the Successful Implementation of the Homecoming Model

In order for the **Homecoming** model to be fully implemented, several essential ingredients must be present: (1) administrative commitment, (2) instructional staff commitment, (3) a means for accessing expertise of instructional staff, (4) a cooperative planning process, (5) a process for developing transition and maintenance plans for students who present intensive educational challenges, and (6) access to consultative support for the local planning team. This chapter discusses each of these essential ingredients.

The first step in implementing the **Homecoming** model within a school district is to determine the level of commitment of key administrators to the principle of educating **all** students, even those who present intensive educational challenges, within regular education environments in local schools. At minimum, it is necessary that the superintendent of schools, the special education administrator and the building principals support this basic premise.

Before initiating the **Homecoming** model, it is recommended that school districts which place students outside of the district conduct an analysis of current costs for educating students out-of-district. Common costs include special transportation, tuition, and loss of PL 94-142 and PL 89-313 funds which may "follow" the student. One **Homecoming** district which conducted such a cost analysis, found it was paying over $11,000.00 in special transportation costs to send six students to a regional program. This expense plus per-pupil cost billings for regional services and the loss of federal flow-through monies resulted in a cost of more than $30,000.00 per year for the district to send these six students out-of-district. The actual dollars saved in providing educational services locally can be an important determinant in administrative commitment to the education of all learners within the least restrictive environment (LRE) of the local school.

Involvement of the State Education Agency (SEA) consultant in promoting LRE principles can be instrumental in securing administrative commitment for educating all students within local schools. Oftentimes, it is the SEA consultant who can identify additional incentives and benefits to districts for implementing the **Homecoming** model.

District administrators also will want to review current policies and procedures to determine if they present barriers to model implementation. The planning team approach defined by the **Homecoming** model represents a significant departure from the manner in which school administrators and instructional staff have planned for and implemented programs in the past. For some schools it may be necessary to initiate policy and procedural changes at the local building and district level which facilitate the incorporation of a teaming approach into the daily functioning of the school.

An example of a policy change that may be necessary at the building level is the assignment of every student residing within the district to a local regular classroom or "home" room based upon chronological age. This would mean that even students currently in out-of-school placements would appear on a local school teacher's class roster for the year. A related policy would require annual review of those students in out-of-school placements by the **local** school staff including the "home" room teacher. The review would be aimed at identifying barriers to the student's return to the local school as well as reviewing progress toward removing those barriers.

An example of a district-wide policy change in support of **Homecoming** model implementation is the decision to develop for all "graduating" early

education/special education students transition plans which target the local kindergarten as the placement of choice. Policy changes such as these, coupled with empowering instructional staff to support each other through the collaborative teaming process, can set the stage for successful implementation of the **Homecoming** model.

It is important to emphasize that administrative commitment is much more than the issuing of a "zero reject" philosophy statement from a district's Central Office. Administrative commitment is the school board, superintendent, special education administrator, and the building principal taking specific action which demonstrate their belief in "local ownership" for the education of all children. Administrative commitment can be demonstrated in many ways including:

- redistributing dollars to the local school that was formerly spent on transportation and tuition payments to regional special class programs
- employing a consultant with expertise in curriculum areas unique to students with intensive educational needs
- increasing the amount of instructional aide time available to regular class and mainstream educators
- dedicating in-service training to instruction identified by school staff as needed in order to educate students with more intense needs
- hiring substitutes, or arranging release time so that school staff may go to workshops, observe programs, or meet to plan for students
- publicly acknowledging teachers' integration efforts in award ceremonies, newsletters, or other public events or publications
- bringing school board members to the local schools to see the achievements of teachers educating students with more intense needs
- "being there" - taking the time to attend, when possible, the planning and problem-solving sessions for students with more intense needs.

Through such actions as those noted above, administrators communicate their commitment to the local school staff. They communicate: (a) their strong belief in the notion of "local ownership" and responsibility for the education of students with intense needs within district schools; (b) their willingness to support teachers' efforts to educate all children by responding to identified training and resource needs; and (c) their appreciation for teacher efforts.

## Instructional Staff Commitment

Although district administrative commitment is necessary for implementation of the **Homecoming** model, it is not sufficient. It is also necessary to develop commitment on the part of the instructional staff to the principle of educating all students within their school. Not everyone will have the same level of commitment, but everyone will need to agree to support the implementation of the model within their school.

Critical to the development of instructional staff support is their involvement in the decision to implement the **Homecoming** model. Staff meetings attended by the district administrators should be used as a forum to discuss the district's and school's responsibilities in the education of all students, including those who present intensive educational challenges. SEA representatives and staff from schools already implementing the model may be brought to the district to discuss their experiences with the local staff. Arrangements also may be made for teachers from the local school to visit and speak with staff in a district which has adapted the **Homecoming** model. Inservice training on "best educational practices" also could be arranged to inform staff of current regional and national trends that support the education of all of their students in their local school.

## A Means for Accessing Local Expertise

Local schools have within them a natural and oftentimes untapped pool of "experts". These "experts" are the grade-level teachers, school nurses, language arts and math teachers, guidance counselors, resource room teachers, vocational educators, physical education teachers, home economics teachers, and foreign language teachers who make up the instructional staff of a school and who have expertise not only in their assigned teaching areas but in a wide range of other areas. Each teacher's unique skills and interests may be of value to another teacher and a broader range of students than the subset of students assigned to his or her classroom. For example, a special educator, hired to teach students with mild learning problems may also have training and experience in managing students presenting disruptive behaviors and may be helpful in assisting a third grade teacher to design a behavior management program for her classroom. The third grade teacher, on the other hand, may have a special interest or training in computer-aided instruction, and may be able to assist the special educator in selecting and adapting computerized instructional programs for a group of fifth and sixth graders with special educational needs. All too often "in-house experts" such as these two teachers are not routinely given the opportunity to share their expertise with their colleagues.

A key to successfully meeting the educational needs of all students is the development of a collaborative relationship among the school staff so that expertise can be shared. The **Homecoming** model uses the **local planning team** as a vehicle for nurturing a collaborative, cooperative relationship among instructional staff. The planning team is a group of individual "experts" who agree to cooperate to attain a common goal, and contribute their unique expertise to the group endeavor. The desired outcome of team problem-solving is shared ownership and responsibility for implementing the solutions generated by the group.

It is very likely that every member of the school staff eventually will be called upon to join a school's local planning team, since team membership changes with each referred student's need for expertise and support. A core team initially assesses a student's needs and, then, expands to include other key staff who are or may become involved in the student's educational program.

## A Process Which Allows for Cooperation Among Team Members

For a local planning team to accomplish its objectives, its members need to learn to function **cooperatively**. A **cooperative** team is one in which the members perceive that they can obtain their goal if, and only if, the other team members also obtain their goals. **Homecoming** Project experience suggests that team members who share this perception are more likely to reach agreed-upon solutions and have positive interactions and mutual feelings of ownership for their solutions. Particularly when a team has a diverse membership (i.e., diversity in personal expertise, training backgrounds, teaching experiences, instructional competence), as does a local planning team, the "best" decision regarding a student demands cooperation and the contribution of each and every team member. The cooperative planning process is more fully discussed in Chapter 4, "The Cooperative Teaming Process".

## A Process for Developing Transition & Maintenance Plans

Planning teams involved in the **Homecoming** Project have generated and used a planning process to successfully transition and maintain students with intensive educational challenges within regular education environments. The planning process for the transition and maintenance of students in local school placements includes the following activities:

1. Identify team membership for each individual student
2. Identify the student's educational strengths and needs
3. Identify existing resources available to the student's program
4. Describe the student's current educational program including current activities, settings, materials and teaching strategies

5. Identify potential next placements
6. Describe potential next placements
7. Analyze the specific activities, settings, teaching styles and materials available in all potential next grade placements and for the student's current placement
8. Develop a best match between the student's skill level, educational needs and available next placements
9. Develop a schedule of activities with materials, needed adaptations, and resources identified for the current or next year's placement
10. Develop specific transition activities (e.g., classroom visit), if needed
11. Provide for additional resources to the student's program (if needed)
12. Provide for technical assistance to the student's program (if needed)
13. Provide for training of school staff (if needed)
14. Provide for continued parental involvement in the student's program
15. Monitor the student's progress and make needed adaptations in the plan

Each of the planning team activities are more fully described in the following chapter, "The Local Planning Team Process for Transitioning and Maintaining Students within Local Schools".

## Access to Consultative Support for the Local Planning Team

As already emphasized, the local planning team and consultation components of the Homecoming model require the availability of a professional with extensive background and experience in developing integrated educational programs for students presenting intensive educational challenges. This professional, referred to as an educational specialist (ES), must be able to provide consultation, training and technical assistance to the local planning team. The ES must be able to work with the planning team as a cooperative team member, rather than as an "outside" expert, as all planning team members are "experts" in their own right. It is essential to the Homecoming model that local instructional staff have confidence in the ES's ability to assist them when they need help with a particular student's program. This support, plus the support of the administration in providing needed resources is critical to the success of the model. A more detailed explanation of the consultation component and the role of the ES is provided in Chapter 5, "The Consultation Component".

The chapters which follow detail the planning team process for the transition and maintenance of students in local schools. Competencies for the ES and for team members implementing the collaborative teaming process also are delineated. A final chapter discusses some of the persuasive issues which parents, teachers, special educators and administrators have encountered as they have developed and implemented the Homecoming model. ■

# CHAPTER 3

*A detailed explanation of each step in the planning process is provided.*

## The Team Planning Process for Transitioning and Maintaining Students within Local Schools

As described in Chapter 1, the functions of the planning team for students who present intensive educational challenges to the local school are:

1. to provide support to instructional staff to maintain students within regular education environments by developing instructional plans to address current learning and behavior problems and transition plans for moving those students to next grade placements within their local school; and

2. to develop educational plans to provide for the smooth transition of students from non-local school placements (e.g., regional special class, early childhood/special education programs) to local school placements.

The following section describes the step-by-step process that planning teams utilize when planning for students referred for support. These steps or activities are generic to all students whether the student initially requires transitional or maintenance services.

Students transferred from out-of-school placements to the local school initially will require a transition plan as well as an appropriate educational plan within the local school. Once transferred, students will need a plan for maintaining them within the local school. This maintenance plan should include strategies for monitoring the students' educational plan and activities which prepare them for the expected transition to the next grade level. For students already in regular class placements within the local school, an instructional plan will need to be developed to address specific learning or behavior problems which led to the referral to the local planning team. As the school year progresses, the planning team's focus will shift to transitioning the student to the next grade placement.

Because the team performs transition and maintenance activities for all referred students, these activities have been merged into a generic process described in *Table 2*. A subset of these activities are unique to the development of a transition plan. These activities are **(Step 5)** the identification of potential next placements, **(Step 6)** the description of potential next placements, **(Step 8)** the selection of the next placement, and **(Step 10)** the development of transition activities.

TABLE 2. TRANSITION AND SUPPORT ACTIVITIES

1. Identify team membership for each individual student
2. Identify the student's strengths and educational needs
3. Identify the existing resources provided to the student's program
4. Describe the student's current educational program including current activities, settings, materials and teaching strategies
5. (TRANSITION STEP) Identify potential next placements
6. (TRANSITION STEP) Describe potential next placements
7. Analyze the specific activities, settings, teaching styles and materials available in all potential next grade placements (for transition planning) and for the student's current placemen (for support planning)
8. (TRANSITION STEP) Develop a best match between the student's skill level and educational needs and available next placements;
9. Develop a schedule of activities with materials, needed adaptations, and resources identified for the current or next year's placement;
10. (TRANSITION STEP) Develop specific transition activities (e.g., classroom visit), if needed; and
11. Provide additional resources to the student's program (if needed)
12. Provide technical assistance to the student's program (if needed)
13. Provide training for school staff (if needed)
14. Provide for continued parental involvement in the student's program
15. Monitor the student's progress and make needed adaptations in the plan

## 1. Identify Team Membership for Each Student

As students are referred to the local planning team, the team must identify team membership for the student, based upon the referral problem. For example, if a student is referred for transition from a regional classroom to the local school, the team will need to include the student's current special class teacher, at least one age-appropriate grade level teacher from the local school, the local special educator, a local administrator (or representative of the administrator), and the student's parents. Depending upon the student's educational needs, a consultant may also need to be identified to support the team process and to provide technical assistance and training to local school staff.

Suppose a teacher from the local school refers a student currently in his or her class in order to gain support for educating that student. The composition of this team might be the referring teacher, another regular class teacher from the same or similar grade level, a local administrator (or designate), and one or more teachers with expertise in the areas of the student's need. For example, if the referral concerned a reading problem, local staff members with expertise in teaching reading may be added to the team. If the referral concerned a behavior problem, local staff members with expertise in managing student behavior may be added to the team. If local expertise was not available, the planning team would identify a consultant to be added to the team.

The local team should make every attempt to involve the student's parents in team activities. At a minimum, a team member must meet with the parents to explain the team's function with regard to their child and the activities in which the team expects to engage in planning for their child. This person also should determine and set priorities for the family's goals and desires for their child's educational program. A "Parent Inventory" has proven to be useful in identifying family preferences. **Appendix A** offers a sample Parent Inventory form.

## 2. Identify the Student's Strengths and Educational Needs

In order to develop a plan for any student, each of the local planning team members needs to fully understand the student's strengths and educational needs. The team should strive for a complete picture of the child. The current teacher(s) and the student's parents are the best sources of information regarding the student.

Professionals often characterize students in terms of deficits. Special education teachers, psychologists, and even medical personnel are trained to look for deficit areas and to then try to teach to the deficit area or "fix" the problem. Comments such as "Johnny lacks reading readiness skills", or "Sally disrupts the classroom" or "Shawn's IQ score identifies him as mentally retarded" are common. This type of judgmental comment tells us very little about the child.

A more productive approach is to discuss a student's strengths and needs in terms of specific skills that the child can perform at the present time and the level or quality of performance. These skills also should be related to functional "real life" situations. For example, describing Johnny as being able to independently dress and undress himself at home emphasizes his skills. It also emphasizes skills which are functional and likely to make him more independent. His mother reporting that he needs assistance selecting the clothing appropriate for the weather indicates his level of independence in dressing and suggests what might be a future self-care objective for Johnny.

An activity that teams have found to be very useful in identifying a student's strengths and needs is for a member of the local planning team to observe the student in his/her current classroom. This is particularly critical if the student attends a school other than the local school. This may be the first opportunity for a local school staff member to place a face with the student's name and to get to know the student as a person rather than as a referral problem.

Some important skills which should be observed are those termed "survival skills". Survival skills are those skills deemed important for a student to function

successfully within a classroom setting. Included among them are such skills as working independently, following classroom rules, sharing materials, and asking questions. **Appendix B** depicts a Survival Skill Checklist which several schools have found useful.

The Survival Skills Checklist is particularly important for planning for a student's transition to a new educational placement (e.g., preschool to kindergarten, 3rd to 4th grade, special class to regular class). The potential next grade teachers indicate on the checklist behaviors expected of students in their particular class. The current teacher then rates the student on each of these items. A discrepancy analysis then is performed which indicates those skills the student requires assistance with in order to perform. These skills then are targeted for training and/or adaptation.

### 3. Identify Existing Resources Provided in the Student's Program

The current teacher should describe to the team existing resources and services that are being provided to the student's program. For example, the team needs to know whether the student currently is served by a special educator, speech pathologist, occupational therapist or physical therapist. Is the student served by an individual instructional aide? If so, how much aide time is utilized per day? Is the student provided with adaptive equipment such as a special travel chair, computer, communication device, walker, or leg braces? Is the school nurse involved with the student due to health concerns? If the team is planning a transition to a new educational setting, it must be made clear whether or not services, materials, or equipment will follow the student to his/her new educational setting. For example, if the student has an individual aide provided through the State Department of Education, that aide position should follow the student to his new school.

In summary, the team should be made aware of current resources provided to the student so that it may include the use of those resources within the student's future educational plan. If resources currently provided will not follow the student, the team needs to plan for the development of those resources.

### 4. Describe the Student's Current Educational Program

The description of the student's current program should indicate for each activity adaptations to the activity (if any), the instructional settings, materials, the group size and the teaching strategies employed. **Appendix C** provides a format for describing the student's current program along these dimensions.

### 5. (Transition Step) Identify Potential Next Placements

The purpose of identifying all potential next placements is to analyze each placement and determine among them which is the most appropriate for the student. As a rule, next placements should be age appropriate (e.g., classes with students at or near the same age). That is, if a student currently is in 3rd grade, 4th grade classes should be considered. For students transitioning from a regional special classroom to a local school, placement options should be limited to classes with students within two years (older or younger) of the student's age. Other variables to consider might be class size and willingness of the particular classroom teachers to participate in the planning process.

### 6. (Transition Step) Describe Potential Next Placements

The description of each next placement should indicate each activity, the instructional settings, materials, the group size and the teaching strategies employed. **Appendix D** provides a format for describing potential next grade placements along these dimensions.

### 7. Analyze Current Placement or Potential Next Placements

It is true that teachers of classrooms from the same grade level within the same school often provide quite different activities and classroom arrangements. Teachers also differ in their teaching style and the types of materials they use for teaching the same skills. It is, therefore, extremely important that the team is aware of differences in potential placements so that the student may be matched to the placement which will best meet his/her educational needs. It is also important to analyze the current classroom activities for students referred to the planning team for the purpose of providing support to their current program.

Each activity of the student's current program (for student support), or each activity of each potential next grade placement (for student transition), should be analyzed in relation to the student's current skills and educational and social needs. For each activity, the team should determine the appropriateness of the activity for the student as well as adaptations in materials, curricular goals and level of personal assistance which will be needed for the student to benefit from the activity. Alternative activities may also be considered at this time. **Appendix E** displays a form which has been useful for analyzing classroom activities.

### 8. (Transition Step) Select the Next Placement for the Student

Once the team is knowledgeable of the student's skills and needs as well as the activities, instructional strategies, materials, adaptations and alternative activities which will be available to the student within each potential placement, the team is ready to make a decision. The outcomes of the team's decision should be a recommendation regarding placement and the initiation of local school procedures for obtaining that placement.

### 9. Develop a Schedule of Activities

A key activity of the planning team is to develop a schedule of activities which details needed adaptations, needed materials, locations in which services will be provided, the person responsible for the student during each activity, and other resources (e.g., aide time, peer buddy) needed for the student to be included in identified activities. As the daily schedule is developed, each activity addressed should be coded to the student's IEP objectives to insure that all objectives are adequately addressed within the schedule. Alternative activities also need to be identified to replace certain classroom activities, if there are activities not considered appropriate for the student or if additional activities must be included to support IEP objectives (e.g., shopping in a community store). A form which teams may use to develop a detailed daily schedule for a student is displayed in **Appendix C.**

### 10. (Transition Step) Develop Transition Activities

For students who are transitioning to new educational environments, the local planning team will need to decide if particular preparation experiences should be arranged prior to beginning in the new school situation. The decision whether or not to develop these experiences will depend upon at least three factors: (a) the student's prior experiences in transitioning to new classrooms; (b) the comfort levels of the receiving teachers and the student's parents with the transition; and (c) the demands of the new school environment. A typical transition activity is for a student to visit the new school and classroom prior to the actual transition. The development of special instructional programs for the remainder of the current year to prepare the student for new activities in the next school setting is also a common activity. A student transitioning to Junior High School, for example, might need prior training in the use of a locker.

## 11. Provide for the Addition of Resources to the Student's Program as Needed

After reviewing the student's current program and educational needs, the team determines whether the student needs additional resources above and beyond those already available in the school. For example, the team may determine that a student needs an individual aide in the regular classroom for two hours of time each day. If the additional resources require capital expenditures, it is essential that administrators and school board members are aware of the need as soon as possible, so that money may be budgeted for the upcoming year. In any case, the team is responsible for contacting the special education administrator, the local building principal, or the school board to solicit additional resources.

The team also needs to explore alternatives to the expenditure of new money. For example, it may be possible to avoid hiring a new individual aide by reallocating the time of currently employed school aides or by developing a community volunteer system or a peer tutor/buddy system.

## 12. Provide for Technical Assistance to the Student's Program as Needed

For some students, the team may identify the need for technical assistance in planning or implementing the student's program. In such cases, the team needs to decide (a) who will provide the technical assistance (e.g., educational specialist, local learning specialist, physical therapy consultant), (b) for what reasons (e.g., to develop and monitor educational programs, to train direct instructional staff in implementing programs, to monitor and provide feedback to the teacher on a classroom management program), and (c) how frequently services should be provided (e.g., weekly, a three day initial training session with bi-weekly follow-up).

## 13. Provide for Training of School Staff and Students Without Identified Handicaps as Needed

Formal or informal training sessions may be identified by a local planning team as important to enable school faculty and students without identified handicaps to offer positive educational and social experiences to a student with special needs. In Vermont schools, training has been provided to (a) increase students' and staff awareness regarding the impact of a handicap on an individual (b) inform staff about specific health or safety concerns such as the appropriate methods for dealing with a grand mal seizure, (c) clarify referral procedures and the various functions of a local planning team, (d) inform staff on exemplary educational practices, (e) explain specific methods of non-verbal communication, and (f) assist staff to develop volunteer systems within local schools. Of course, topics will vary depending upon the specific characteristics of the students educated within the school and the current level of awareness and expertise of the local school staff and students without identified handicaps.

If the local planning team determines that training is needed, a recommendation for such training should be forwarded to the appropriate administrators in charge of inservice training (e.g., Superintendent of Schools, Special Education Administrator). The team, with the appropriate administrator, may help to arrange for training to take place.

## 14. Provide for Continued Parental Involvement

An important function of the planning team is to support ongoing home school relations. The planning team is responsible for arranging with the student's parents a workable parent/teacher communication system and other activities which facilitate their involvement in their child's school program. In

most cases, it is appropriate for one team member (the child's teacher, the local special educator, the educational specialist) to be designated the primary parent contact person.

It is important to recognize and to appreciate that parents of students with special educational needs have varying personal and family responsibilities and needs. The extent to which a family will become directly involved will be determined by their child's needs, the family's other needs, and the school's needs. At a minimum, the parents need to be afforded every opportunity to plan with the local team and regularly receive information regarding their child's progress and any program changes. Their advice and wishes should be solicited and seriously considered throughout the planning process.

### 15. Monitor Student Progress and Modify the Plan as Needed

Planning activities regarding a student do not stop with a placement decision or the solving of the initial problem that led to a student's referral to the team. The team is an ongoing resource available throughout the school year to meet with and assist instructional staff in modifying programs or solving unforeseen problems. The number of follow-up meetings which occur per school year will depend upon the level of support which instructional staff feel they need. Any member of the team should be able to call an "emergency" meeting of the team. The Educational Specialist and each school's special education and related services staff also are ongoing sources of support who can assist instructional staff to adapt individual students' instructional or behavioral programs. ■

# CHAPTER 4

*An overview of the cooperative teaming process and suggestions for its implementation within local schools are presented.*

## The Cooperative Teaming Process

In order for any team to successfully accomplish a task, team members need to agree upon the goal or overall outcome they hope to achieve. In the case of local school planning teams, the goal is to develop and implement a plan for educating students who present local school staff with educational and behavioral challenges within their neighborhood schools. The way in which team members choose to structure their interactions as they work toward goal accomplishment determines:

(a) whether the goal is achieved to the satisfaction of all members;
(b) whether each member feels a sense of "ownership" for the group's outcome; and
(c) the extent to which members maintain relationships with one another.

People in organizations, including educators in public schools, consciously and unconsciously choose to structure their interactions so they are:

(1) in a win-lose struggle to see who is best;
(2) on their own working individualistically; or
(3) helping each other to achieve the desired outcomes.

These three ways of accomplishing goals have been referred to as competitive (negative interdependence), individualistic (no interdependence), and cooperative (positive interdependence) goal structures (Johnson & Johnson, 1975). A competitive goal structure exists when members of a team perceive that they can obtain their goals if, and only if, the other members of the team fail to obtain their goals. An example of this "win or lose" goal structure is when, at an IEP meeting, some participants advocate for placement outside of the local school and others advocate for a regular class placement. In such a situation, group members might choose to pit themselves against one another, and may view themselves as winning or losing if the student leaves or stays in the local school.

An individualistic goal structure exists when the actions of one team member are unrelated to that of another team member. An example of this "we are all in this alone" goal structure is when professionals (e.g., speech and language pathologist, special education teacher, adaptive physical education teacher) with the common goal of developing a student's Individualized Education Plan (IEP), develop their section of the IEP individually and then give completed sections to the teacher to be stapled together to form a "comprehensive" document. In such a case, IEP goals and objectives developed for various curriculum areas are often unrelated and reflect the individual professional's needs and desires rather than the needs of the student.

A cooperative goal structure exists when the members of a team perceive that they can obtain their goal if, and only if, the other team members also obtain their goals. An example of this "sink or swim together" goal structure is when teachers currently involved with a student, and those who may instruct the student in the future, work together to plan for a transition which will benefit the student (i.e., achieve the common group goal) and, simultaneously, meet the needs of individual team members (i.e., achieve the individual goals of each team member).

Of the three goal structures, a cooperative goal structure is most likely to result in interaction patterns which promote workable solutions to problems, ownership for solutions, good interpersonal relationships, and feelings of

mutuality among team members. Picture a school where all staff agree that their workplace is one in which ideas are shared, help is offered to one another, differing points of view are disputed openly and honestly - all for the purpose of creating the "best" educational opportunities for every student.

Within the schools in Vermont which have succeeded in integrating their students presenting intensive educational challenges, members of local school planning teams have worked to be cooperative rather than competitive or individualistic in their interactions. They have adopted, what could be called, a "collaborative teaming process" to increase the likelihood that team members will develop and perform cooperative or collaborative teaming behaviors. The collaborative teaming process is based upon principles and strategies which have been used widely by educators to teach heterogeneous groups of students to learn cooperatively (Johnson et al., 1984). The major purpose of adult groups, such as school planning teams, using collaborative team processes is to enable people with diverse experience and expectations to generate creative responses to mutually defined challenges (Idol-Maestas, Nevin-Parta, and Paolucci-Whitcomb, 1986). The outcome of collaborative teaming is different from that which an individual team member would produce working alone; that is, "two heads are better than one".

## The Collaborative Teaming Process

The collaborative teaming process may be described as a three-step process in which team members: first, develop positive interdependence; second, practice collaborative skills; and third, monitor and discuss their performance of collaborative behaviors.

### First - Develop Positive Interdependence

A collaborative or cooperative team exists when interdependence is formed - when the members of a team perceive that they "sink or swim together". There are three ways which collaborative teams develop this interdependence.

**Goal Interdependence.** Interdependence is created among collaborative team members when they agree to do all that is in their power to achieve a mutually agreed upon goal. While team members agree to a common goal, they also recognize and respect individual members' personal goals which may or may not directly support the achievement of the group goal. For example, the goal of a school planning team may be to design a schedule for a student presenting an educational challenge which includes as much time in a regular first grade as possible. While designing this schedule, personal goals of individual team members will need to be addressed (e.g., "My goal is to have enough time to prepare for my entire first grade, even with this student integrated into some of my classroom activities."; "My goal is for the student to receive instruction on IEP objectives on a daily basis when integrated into the first grade."; "My goal is to ensure that I will receive adequate training and supervision, as the aide conducting IEP programs for the student in the regular classroom.") The overriding goal, however, remains the mutual team goal.

**Resource Interdependence.** Interdependence also forms among collaborative team members when there is resource interdependence among team members. A collaborative school planning team is a natural source of resource interdependence - it is composed of a diverse group of people with personal resources derived from their varied training backgrounds, teaching experiences, and instructional expertise. The "best" decision regarding a student, then, demands the contribution of each and every team member.

Additional resource interdependence is created through a division of labor within the team. From one team meeting to the next, team members take on different leadership responsibilities. With shared leadership responsibilities, the team has no one leader; no one person has all of the information, expertise,

authority, or material resources needed to achieve the goal. The rotating leadership roles assumed by team members include the following:

**FACILITATOR** - The facilitator encourages each member of the team to participate.

**RECORDER** - The recorder records the team's agenda on a publicly displayed flip chart.

**TIMEKEEPER** - The timekeeper monitors the time allotted for each agenda item, encourages the team to stop activities at agreed upon times, and alerts the team when it is approaching the end of an agreed upon time period.

**OBSERVER** - The observer observes and records team members' behaviors which promote task achievement or maintenance of relationships and discusses these observations with the team at the end of specified time periods.

**Reward Interdependence.** The third way in which interdependence is created among collaborative team members is by group members receiving the same reward to achieving the group goal. If the goal is achieved, all members share in the gratification of having contributed to its achievement. No one person receives special recognition. Likewise, if the goal is not achieved, no one person may be pointed to as responsible for this failure, as resources and leadership responsibilities were distributed among all team members. In some cases, special group rewards are arranged to reward those who participate as a member of a school planning team. An example of an arranged group reward is additional teacher release time for all team members.

## Second - Practice Collaborative Skills

Research evidence clearly specifies that there are certain sets of skills that are related to successful collaboration (Johnson & Johnson, 1975; Johnson, 1981; Johnson & Johnson, 1982). In order for a team to be optimally effective in its planning and problem solving, team members need to learn and practice these skills.

The first set of collaboration skills are ones for forming a collaborative team. They are basic management skills that result in an organized team with an established set of expectations for what will occur at and following team meetings. Important skills in this category include:

1. Using a structured written planning and recording format to notify team members of:
   - the purpose (agenda items) and length (time limit) of a meeting
   - acknowledging present and absent members
   - assigning roles (i.e., facilitator, recorder, timekeeper, observer)
   - assigning group and individual tasks to be performed before the next meeting
   - having a system to ensure that everyone has "their say", with no "put downs"

The second set of collaborative skills are ones needed to establish smooth functioning of the collaborative team. These skills focus upon two sets of leadership behaviors: (1) behaviors which assist the team to **accomplish the task**, and (2) behaviors which assist team members to **maintain positive working relationships** with one another. The secret is for each team member to assume **individual responsibility** for performing these behaviors, rather than expecting someone else (e.g., the special education coordinator, the principal, or the learning specialist) to direct team members' behaviors.

Tasks and relationship skills which team members should practice during meetings are listed in **Table 3.**

TABLE 3. COLLABORATIVE SKILLS

| TASK | RELATIONSHIP |
|---|---|
| •Offering Information | •EncouragingParticipation |
| •Offering Opinions | •Offering a Tension Reliever |
| •Acting as an Information Seeker | •Being a Communication Helper |
| •Acting as a Summarizer | •Being a Process Observer |
| •Diagnosing Group Difficulties | •Being an Active Listener |
| •Coordinating Work | •Offering Support to Ideas |
| •Acting as a Recorder | •Offering Personal Support |
| •Acting as a Timekeeper | •Being a Praiser |
| •Giving Help | •Being a Harmonizer & Compromiser |
| •Asking for Help | •Being an Interpersonal Problem Solver |
| •Asking Questions | |

A third set of collaborative skills are important when teams are faced with conflict of opinions, controversy, and the need to reorganize existing information or create new systems. Performance of these skills reflects team members' positive attitudes and appreciation for differences of opinion and their competence and confidence in handling conflicts. Some important skills which team members need to practice in this area are:

1. Criticizing an idea, not the person
2. Integrating several opinions into a single position
3. Probing for more information by asking questions such as, "How might it work in this situation...? "What else leads you to believe...?
4. Building on a teammate's idea or conclusion
5. Seeing an idea from another person's perspective.

When a collaborative team is formed, members of the team are at a variety of different levels in their competence and confidence in performing the conflict resolution skills described above. As collaborative teams continue to meet, members need to practice these skills in order to generate creative solutions in an atmosphere that supports divergent and convergent thinking.

## Third–Monitor and Discuss Team Members' Performance

The three sets of skills related to successful team collaboration are best learned and practiced by team members when there is a structured system for monitoring and discussing team members' performance during team meetings. An effective method for ensuring such monitoring is to have a team member assigned in an OBSERVER role during each team meeting. To review, the OBSERVER is a team member who observes and records other team members' behaviors which promote task achievement and maintenance of relationships, including conflict resolution. The OBSERVER discusses these observations with the team at the end of specified time periods. It is useful to set aside at least two time periods (e.g., one midway through the meeting and one at the end of the meeting) to discuss these observations.

During discussion periods, the team may target one or more specific skills for intensive practice by all team members during the remainder of the meeting or at subsequent meetings. Each team member may also select individual skills identified as needing improvement for intensive practice in future meetings.

A sample of an observation form which has been used with some collaborative school planning teams appears in **Appendix F**. The name of each team

member is listed across the top of the page, and the OBSERVER places a tally mark in the appropriate skill category for a team member, when that skill is performed by the person. Often, the OBSERVER chooses not to participate in the team's discussions while observing, as it is difficult to simultaneously observe and record the behaviors of several people and join in on a discussion. It should be noted that the specific skills included on the observation form should change from one meeting to the next, as a team identifies both its strengths and the skills in need of further practice, monitoring, and processing.

Local planning team members participating in the **Homecoming Project** have expressed continued satisfaction with the local educational programs and the effectiveness of the school planning teams in problem-solving for students. ■

# CHAPTER 5

*A general discussion of consultation models is presented. Four local planning team and consultation models which have been implemented in Vermont are described including detailed descriptions of the consultant role.*

## The Consultation Component

As mentioned in previous chapters, the local planning team is an essential element for the development of shared ownership of educational programs for all students residing within the local community. Regular educators, administrators, special educators, and parents working together to develop resources for the education of even the most challenging students is the essence of shared ownership. However, even under ideal circumstances, cooperative planning alone may not guarantee local school placement and quality programs for the most challenging students. Equal in importance to the planning team is the presence of a professional expert in developing integrated programs for challenging students who can offer consultation, training and technical assistance to local school staff. This new type of special educator will be referred to as the Educational Specialist (ES).

At the start of the **Homecoming Project**, all of the ES's now employed by the four participating supervisory unions had training and considerable experience in the education of students with handicaps. Through the **Homecoming Project**, they received additional training (i.e., graduate level coursework, inservice training and technical assistance) from project staff to develop or enhance their skills in such areas as behavior management, instructional design, interdisciplinary delivery of services, exemplary educational practices, team building and interactive processes, communication skills and information dissemination.

Each of the four participating supervisory unions has developed a service delivery model for students presenting intensive educational challenges which has unique features reflective of the resources available within local schools and the needs of individual students. However, common to all the existing programs are: (a) the development of local planning teams for students, (b) the development of the ES position, and (c) new policies and procedures prescribing the delivery of ES services. All four model programs, described in more detail below, currently operate independent of the **Homecoming Project**.

**THE FRANKLIN NORTHWEST MODEL:**

In the Franklin Northwest Supervisory Union, the ES currently serves students presenting intensive educational challenges, kindergarten through grade 12, in regular education environments in seven local public schools. In this supervisory union the classroom teacher functions as the student's day-to-day case manager, and is joined by other local school planning team members to monitor the student's progress on IEP objectives. The local planning teams also develop each student's daily schedule and determine where, when, and who will carry out instructional programs.

In the Franklin Northwest model, direct instruction is carried out by a variety of special and general education staff. In addition, a number of students have been recruited and trained to provide direct instruction as peer tutors. Students may also serve as peer "buddies" who, for example, assist other students on and off the school bus and take students to lunch and provide them with assistance in eating. The role of the ES in Franklin Northwest is to provide technical assistance to teachers and to design special individualized programs for challenging students. She is responsible for conducting ongoing formal training sessions for all of the

instructional aides employed by the supervisory union. When a new instructional program is initiated, she demonstrates the teaching required and then coaches the staff who then assume responsibility for that teaching. She then monitors the teaching and is available to help as the need arises. On occasion, she takes over direct instruction responsibilities to free professional staff to meet with parents, carry out one-to-one instruction and conduct training in the community. Because of her unique expertise in the area of social skills instruction, she has also provided social skills training to high school students in need of such skills development.

The ES in Franklin Northwest, has some important liaison functions with administrators, parents, school board members, local business persons, and other community members. She provides information regarding the abilities and the needs of students she serves through school board presentations, regular meetings with administrators, and personal contact with families and community members. She also surveys school staff to identify their training and support needs and, with the administration, develops appropriate action plans to address these needs. This year,for example, the ES and a team of administrators and teachers developed district-wide procedures for transitioning students from early childhood/special education to kindergarten, from one grade to the next grade within a building, from one building to the next building, and from high school to the adult world.

**THE FRANKLIN CENTRAL MODEL:**

The Franklin Central Supervisory Union model is somewhat different from the Franklin Northwest model. Franklin Central is a host school district for a regional special education program from which a large number of students have returned to their home schools. The students who remain, and are eligible for special class services, are assigned to a regular homeroom class and participate in regular classroom instruction and other activities (e.g., art, library, and lunch) to varying degrees. The time spent outside of regular classrooms is spent in special classrooms or resource rooms, where other students needing special education services are served. One of the former special class teachers of the regional special class program has assumed the full-time role of ES for the school district. Her responsibilities are much like those of the Franklin Northwest ES.

**THE WINOOSKI MODEL:**

The Winooski School District has also hired an ES who serves students in kindergarten through grade 12 with intensive educational needs. Although she also performs many of the functions of ESs described above, a major difference in her role is that she provides some direct instruction to students.

**THE SOUTHWEST VERMONT MODEL:**

The Southwest Vermont Supervisory Union is the fourth district to initiate the Homecoming model. As an initial step in providing home school placement for all students within the union, an ES was employed to develop a model for transitioning students from the early childhood/special education program into local kindergartens. Four students from the regional special education program also were transitioned back to their local schools. The role of this ES (referred to as "mainstream consultant" within the district) is very much like that already described for the other ESs. Similar to the model in Franklin Northwest, the local schools have case management responsibilities for every child. The mainstream consultant is called upon through a referral process. She joins the planning team only if the team determines the need for her expertise. The model assumes that most

students entering school from early childhood/special education programs will not require intensive special education services and can therefore be educated using existing local resources. The mainstream consultant is available to local planning teams for those students who do require more intensive educational programming or modifications of existing general education curricula.

It is important to emphasize here that each of the four consultation models described above is in a constant state of evaluation and modification and will continue to develop based upon the unique and changing needs of each school district. Although accurate at the time of this writing, the models can be expected to change over time.

## Characteristics of the Educational Specialist

An ES who is selected to work with local planning teams needs to demonstrate competence in a number of areas. At a minimum, the ES should have expertise and experience:

1. developing educational programs and behavioral interventions for students presenting the intensive educational challenges;
2. developing modifications and adaptations for regular education activities and curricula for including students who present educational challenges;
3. providing consultation and technical assistance to regular education staff;
4. developing and implementing cooperative teaming strategies;
5. providing formal and informal training to other professionals, paraprofessionals, volunteers and the larger community;
6. developing cooperative parent/professional relationships;
7. evaluating the effectiveness of educational programs for individual students; the consultation, technical assistance and training provided to local teams; and related activities such as volunteer systems, handicapped awareness activities, and the development of friendships between handicapped and non-handicapped peers.

The ES, then, needs to be a master teacher, an experienced teacher trainer, a cooperative team member, a family advocate and should posses excellent interpersonal and communication skills.

The Special Education Department at the University of Vermont has initiated (beginning in August, 1986) training at the post-masters level for Educational Specialists. Candidates for the ES program are masters-level special educators with experience and demonstrated expertise in educating students with intensive educational needs within integrated settings. The C.A.S. (Certificate of Advanced Study) program is a two-year program which provides training and field experience in the development of planning teams and teaming processes within local public schools. ES trainees also receive instruction and guided practice for consulting within mainstream settings to address educational problems of students who vary in age (three to 22 years of age) and in type and severity of educational or behavioral need.

Specific competencies which ES graduates will be expected to demonstrate upon completion of training are:

1. Analysis of behavior and instructional programming
   Trainees will design, implement, and evaluate instructional and behavioral programs so that students presenting intensive educational challenges acquire appropriate skills and knowledge (e.g., in the domains of self-care, social behaviors, communication, etc.).

2. Technical assistance
   Trainees will demonstrate their ability to provide technical assistance to regular and special educators and administrators to improve the education of students presenting intensive challenges within their local public schools.

3. Training others

Trainees will demonstrate their ability to train others (parents and other family members, regular and special educators, non-handicapped peers, and other members of the school and community) to implement effective instructional programs for students presenting intensive educational challenges.

4. Team building

Trainees will demonstrate the ability to develop local planning teams ofparents, regular and special educators, and administrators for planning, implementing and evaluating strategies for educating all students within their local public schools.

5. Interactive process

Trainees will demonstrate their ability to use interactive processes for developing shared responsibility among parents, regular and special educators and school administrators.

6. Communication/dissemination

Trainees will demonstrate their ability to disseminate information related to the education of challenging students and communicate with parents, learners and their peers, regular and special education teachers and administrators, school board members and other members of the school and community.

7. Parent/professional partnership

Trainees will demonstrate the ability to collaborate with parents and educators to encourage the development of parent/professional partnerships for educating challenging students in regular education environments.

8. Physical and developmental characteristics of challenging students

Trainees will demonstrate their ability to manage challenging students through appropriate handling, positioning, feeding and toileting procedures, curriculum adaptation, and assessment to meet individual needs in the curriculum areas of sensori-motor, cognitive, self-care, motor and communication.

9. Curriculum for challenging students

Trainees will demonstrate the ability to develop functional curricula for challenging students in the areas of community living, vocation, domestic living, recreation/leisure, social skills, and communication. Trainees will assess students' entry level, set priorities of skills for instruction, and design instructional programs targetted at skill maintenance and generalization for each curriculum area.

10. Best educational practices

Trainees will identify and be able to clearly articulate the "best educational practices" for challenging students that address the issues of least restrictive environment, social integration, assessment, curriculum and instruction, parent involvement, delivery of related services, transition to new environments, and program evaluation.

11. Social policy affecting education of learners with severe handicaps

Trainees will be able to identify federal, state and local policies and describe their impact upon 1) current local practices for educating challenging students, and 2) implementing "best educational practices" for these students and their parents.

12. Continued professional development

Trainees will develop and implement a plan for their continued professional development that will include regular opportunities for 1) professional interactions, 2) professional literature reviews, 3) professional adaptations of best practices (related to both direct instruction and training others), and 4) dissemination of best practices.

13. Organizational skills (self & others)

Trainees will demonstrate the ability to manage their time and plan, schedule and document their professional activities so they may evaluate their efficiency and effectiveness in achieving their goals and objectives.

## Consultation Models

When considering the development of local planning teams to support students within local schools, the method for obtaining the necessary consultation services must also be considered. A school district must decide which consultation model is best suited to the needs of the schools and the students. The following sections describes three types of consultation models which currently are in operation in Vermont.

## Contracted Services

One method for gaining access to professionals with needed expertise is to contract specific services from professionals available within the geographic area. This model of contracted services is in common use throughout Vermont's school systems. Services typically contracted for specific students include behavior management, occupational and physical therapy services, and psychological testing. Clearly the number of hours of service contracted depends upon the specific circumstances. However, the types of services performed during these hours generally are limited to evaluation, recommendations for program development and follow-up.

Programs in Vermont which are implementing the Homecoming model have contracted with consultants to add needed expertise to individual students' planning teams. Services contracted include physical therapy, occupational therapy and psychological services. To date, no school district has contracted for the services of a professional to act as an ES for a student's planning team. When considering to contract ES services at least three questions should be answered.

1. Is there a person available in the area who possesses the required expertise and is in agreement with the team's mission and goals?
2. How much of the ES's time will each student require in terms of planning, consultation, technical assistance, and staff training?
3. Will the consultant be readily available to staff when needed?

If a great deal of consultation time is projected, contracted services may not be the most cost-effective service delivery model for a school district.

## Supervisory Union Consultation Model

In Vermont, a supervisory union is an administrative unit for several small independent school districts. Many supervisory unions in Vermont currently employ professionals whose job responsibilities include consultation.

Supervisory unions commonly employ consulting teachers, speech and language pathologists, and guidance counselors, who provide consultative services within one or more schools. Several supervisory unions in Vermont have adopted the "supervisory union consultation model" by employing a full-time ES to support challenging students within local schools.

The supervisory union consultation model may be the most effective service delivery model in situations where an ES must allot considerable time to individual target students, school staff planning efforts, intensive training and follow-up. It is the most cost-effective model when there are a sufficient number of students in need of consultation services within a supervisory union.

## Regional Consultation Model

In the regional consultation model, two or more neighboring supervisory unions combine funds to hire a consultant who serves students in all of the unions within the identified region. This model is in operation in Northwest Vermont. Here, a regional consultant has been hired for five supervisory unions to support students with hearing impairments in local school settings.

This model is most efficient and cost-effective when there are too few students in need of consultative services within a single supervisory union to

support a full-time consultant within the union. The regional consultation model has yet to be implemented to support an ES.

It must be emphasized that no matter which consultation model a school wished to employ, the presence of a trained professional with the expertise of an educational specialist is critical to the successful integration of challenging students within local public schools. ■

# CHAPTER 6

## Why Local School Placement? The Vermont Experience.

*This chapter addresses issues and concerns which have emerged regarding the Homecoming model. The issues and concerns have been grouped into three broad categories of: Why local school placement? Issues related to model development; and Issues related to model implementation.*

## Issues Related to the Development of the Homecoming Model

In Vermont, most students with mild learning problems are educated within local public schools in regular classrooms with special education support. In contrast, most students with moderate to severe handicaps are educated in regional special education programs (Note 1). Regional programs consist of self-contained classrooms located within public schools in population centers of the state.

Some students with moderate to severe handicaps have been educated within regular classrooms in their local public schools, even though services were available in regional programs. With the availability of regional special education programs, why have some schools chosen to educate students with intensive educational challenges within their local classrooms?

### No viable alternatives available.

In some school districts in Vermont, the option of sending students to regional programs has not been a viable option due to the distance from the regional program and the student's particular needs. For example, in one rural school district in Vermont, a student with severe multiple handicaps and a fragile health condition received home-based instruction for several years. An instructional aide visited the home for two hours each day. Due to her identified need for more instructional time and the changing family situation, a home program was no longer considered an appropriate alternative for delivering educational services. One school-based option for this student was to send her to a regional special education program for students with severe handicaps which would require a two hours transport per day. A second option was to develop a program within the student's own local school, which was less than a mile from her home. Because of the fragile condition of her health, enrollment in the regional program was determined not to be in her best interests. Therefore a program was developed in her local public school.

Because of the rural nature of Vermont, the above example is not an uncommon one. Approximately one in five Vermont students with severe handicaps is educated within local schools. It is interesting to note that some schools which have elected to educate the most challenging students within their schools, still send students with moderate and even mild handicaps to regional special education programs.

### Pressure from parents and advocates.

Some parents and advocates have insisted that local schools accept their children with intensive educational challenges rather than sending them to a regional special education program. In some instances, students were quickly accepted, once the parents' wishes were made known to the school administration. In other cases, the threat of litigation provided pressure which led the school district to comply with parental wishes.

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Note 1: In Vermont, regional special class programs and early childhood programs are non-categorical in nature; that is, students are not placed according to type of handicap. Special classrooms, then, are comprised of students with a range of handicapping conditions (e.g., Down Syndrome, neurological impairments, cerebral palsy, mental retardation, autism) who have similar educational needs. Classrooms designated for students with mild handicaps are intended for students whose special education needs are predominately academic. Classrooms for students with moderate handicaps serve students whose needs are predominately in the areas of basic skills (self-help, domestic, functional academics, community use). Classrooms designated for students with severe handicaps serve students with few communication skills, and focus upon instruction in areas such as toileting, dressing, imitation of motor movements and vocalizations. The category of severely handicapped includes students with multiple handicaps.

## Economic factors.

Currently, school districts in Vermont are required to pay transportation costs and an average "per pupil cost" for each student sent to a regional special education program. Furthermore, districts sending students to regional programs, forfeit to the district "hosting" the regional program additional federal dollars which would otherwise come to the local school district. In many school districts then, the actual cost of sending children to regional special education programs runs into thousands of dollars; and these dollars are spent on transportation, educational materials and personnel which benefit the school district hosting the regional program rather than the local school. Some school districts have decided to educate students with intensive educational challenges in their schools so that funds will be spent to benefit their own programs.

## The availability of support for the student's program.

In all cases where students who present intensive educational challenges have been successfully educated within their local schools, child support services were requested or developed by the schools. In Vermont, the State Interdisciplinary Team for Intensive Special Education (State I-Team) is available to provide consultation, training and support to the service providers of students identified as severely or multiply handicapped. Services are offered by special educators, physical therapists, occupational therapists, physicians and a non-verbal communication specialist, all trained to work with students with severe or multiple handicaps. I-Team support has been key to the local school placement of many challenging students.

For students identified as mildly or moderately handicapped, I-Team services are not available. Some school districts, however, have developed their own support services for these students and routinely educate most of their challenging students in local school placements.

## Other considerations.

Other factors have led local school districts to educate their students presenting intensive educational challenges within their local schools. First, recent court decisions (e.g., Roncker vs. Walter, 1985) and federal guidelines for monitoring state education agencies regarding the implementation of the least restrictive environment mandate of PL 94-142, have indicated that automatic placement of students based upon category of handicapping condition is unacceptable. A school is required to document that a program in the regular classroom has been attempted and has failed to meet the needs of the student before a placement in a segregated special classroom may be considered. Not only must regular classroom placement be tried, but efforts must be made to document the reasons for the student's lack of progress on IEP objectives in the mainstream setting. Once the causes have been determined, every reasonable attempt must be made to remediate them within the student's current placement. Referral to a more restrictive placement may be made only when such remedial efforts have failed.

Secondly, there has been a recent effort by researchers and educators to identify, clarify and disseminate preferred educational practice for students with intensive educational challenges. A fundamental preferred educational practice for students with intensive educational needs is for such students to be educated within integrated, age-appropriate local schools. Local school placement allows for the implementation of additional preferred practices such as social integration and community-based training which are impractical to fully implement within regional programs. Teaching a student to shop within the community which hosts the regional program may do little to assure that the student will be able to shop in stores located within his home community. Encouraging students to interact with other students in the regional school does little to assist them to develop friendships with children from their own community.

**We don't have the funds to do this.**

The most commonly asked question of administrators in school districts in which challenging students have been integrated into local schools has been, "Where did you get the money to hire the teachers and instructional aides to serve these challenging learners?" The answer has been different in each school district.

In the Winooski school district, the local educational specialist (ES) was funded through the redistribution of State funds available from the closing of regional special classrooms which had formerly served this and other school districts. In the Franklin Northwest Supervisory Union, the ES and two additional instructional aides were funded through: (a) the savings realized by no longer transporting students to the regional programs; and (b) the recouping of tuition previously paid to the State for regional program services and the federal PL 94-142 "flow-through" dollars. In addition, state dollars designated for an aide to an individual student with multiple handicaps "followed" the returning student from his regional program.

In the Franklin Central Supervisory Union and the Southwest Vermont Supervisory Union, the State Department of Education allowed for a change in the job description of teachers in existing educational programs for learners with handicaps.

In Franklin Central, a teacher of a segregated special class was retrained to become an ES. This ES now provides technical assistance to other school staff. Because this teacher was already on the district's payroll, she generated no new expenses for the district. It was the educational service delivery model, not the funding needs, that changed.

In the Southwest Vermont Supervisory Union, the retirement of a teacher of a segregated special class program occasioned a similar change in the service delivery model for young children within the school district. The State Department encouraged the school district to create a new ES position to replace the former special class position. The role of this new consultant has been to assist local school staff to transition and maintain graduates of the local early education/special education (EEE) program in regular kindergarten placements. The availability of this consultant to school personnel has enabled all EEE graduates to avoid placement outside of the mainstream of education. As in the Franklin Central Supervisory Union, this change in job description generated no new expenses for the district. The change was in the educational service delivery model, not in the funding level.

Finally, one school within the Southwest Vermont Supervisory Union has sought and received local school board support to employ a teacher to support challenging students exclusively for that one school. This new position is funded 100% with local funds.

It should be noted that the expense involved in acquiring the needed personnel with expertise to ensure a quality education for students presenting intensive challenges is dependent upon a host of variables including: the amount and quality of existing expertise within the local school district; the willingness of existing personnel to be retrained and expand or alter their responsibilities to include consultation; the unique transportation needs and demographic characteristics of the towns within the district; the unique needs of the students presenting educational challenges to the schools; and the level of local school board support for the notion of education in the "least restrictive environment" for all students. It may, in some cases, cost more for a school district to educate its challenging students within integrated local school environments rather than alternative segregated special programs. However, every dollar spent is spent on instructional services and materials for a local school, instead of gasoline, buses, staff or supplies needed to maintain a regional program.

## I'm not in charge here.

During the initial stages of the Homecoming Project, local school planning team members often voiced concern that they did not have the authority to make decisions. Their past experiences had led them to believe that the principal and the special education administrator were the only ones with the authority and responsibility for school policies and procedures affecting individual students. Taking responsibility for making decisions which could have school-wide impact was a foreign experience to many teachers and one which made them uncomfortable. What was needed was the development of a viable process for decreasing teachers' reliance upon the vested authority, while increasing their own confidence and ability to make decisions.

This need was addressed in at least three ways in various school districts. First, leadership responsibilities traditionally carried out by a single authority figure were distributed among team members. From one team meeting to the next, there was a planned rotation of leadership roles - facilitator, responsible agenda setter, recorder, time-keeper, and observer.

Second, the principal of each school became actively involved as a team member. In some schools, the principal attended all planning team meetings; in others, the principal participated in key meetings in which changes in school procedures were under consideration. In all cases, the principal's active involvement was considered critical. It made legitimate the team's decisions, ensured that decisions could be implemented in a timely fashion, and demonstrated support for the team's effort and actions.

A third method employed to empower teachers and decrease their reliance upon the vested authority was to structure opportunities for them to develop policies and procedures. Eight local school planning teams in two supervisory unions have participated in several extended work sessions to generate individualized local school procedures and district-wide policies for transitioning young children from early education/special education programs into local kindergarten placements. They also have generated processes for obtaining approval and support from their respective superintendents and school boards to make proposed statements official policy of the supervisory unions.

A sample of the proposed transition policy statement generated by 32 teachers and principals from five schools in the Addison Northeast Supervisory Union is presented below.

## Proposed Transition Policy Statement

### Philosophy Statement

*It is the philosophy of the Addison Northeast Supervisory Union (ANESU) that all children have the right to equal access to a quality education. Students with handicaps in ANESU shall be integrated into the least restrictive educational environment.*

### Proposed Policy

- *Each school will transition students with handicaps from one educational environment to the next with maximum opportunities for emotional, social, physical and academic growth.*
- *Each school will have and follow a written set of transition procedures.*
- *Each school will form teams which may consist of sending and receiving teachers, special educators, administrators and other appropriate people. The teams will be responsible for the implementation, monitoring, and evaluation of the transition process based upon the IEP and current policies and procedures in compliance with PL 94-142.*
- *Each school will provide parents/guardians with opportunities to be actively involved in the transition process.*

## I don't have the time.

For all planning team members a primary issue was that of time - finding the time to meet and generate appropriate solutions to problems, as well as, the time to carry out necessary activities for providing an appropriate education for challenging students. Since this was such an important issue for all teams, it became the first agenda item which teams addressed before actually planning for individual students. Building principals also participated in these initial meetings for two purposes - first, to ensure recognition of the effort and the time dedicated to students by individual team members; and, second, to arrange for teacher release time and other types of compensation for engaging in the team's planning activities. Teams and principals negotiated a wide variety of release time and compensating options. For example, in one school, membership on the local planning team was designated as a school duty. Choosing to be a team member, then, allowed a teacher to be released from another duty such as lunch or recess supervision. All teams also established time limits for meetings which were strictly observed. The maximum length of any meeting was one hour.

## No one knows how hard I work.

When local planning teams first formed, many team members expressed feelings of isolation. They feared they were alone in their planning efforts, that other teachers in the building or school district did not realize how much time and energy it took for them to plan for quality educational experiences for challenging students and to effect change within their school building. The principal played an important role in providing team members with recognition and appreciation for engaging in an effort generally not considered a part of teachers' day-to-day job responsibilities. Recognition from the principal for participation in team meetings was only one way in which school staff were publicly acknowledged for their innovative and creative problem-solving efforts. Certificates of achievement were awarded to school personnel involved in educating these challenging learners at school-wide and district-wide ceremonies. The achievements of particular teams and individual team members also were recognized in newsletters distributed throughout the school district.

## I won't do this.

For some teams, the initial stages of their development as a collaborative group committed to a common goal did not come easily. Individual team members and, in a few cases, entire teams exhibited verbal behaviors which created conflict and competition and effectively sabotaged the achievement of the goal of providing a local education for challenging students. The problem, then, was how to encourage productive interactions among team members so that the achievement of the goal was more likely.

One effective strategy for shaping productive team interactions was to provide school personnel with inservice training, the content of which focused upon collaborative teaming. This training developed team members' skills in giving and receiving criticism, negotiating conflict, and team problem-solving. Team members demonstrated observable and sometimes dramatic changes in their interactions at team meetings following the introduction of this training and repeated practice with course instructors and colleagues. Changes were observed in individual members' willingness to negotiate, to simultaneously advance the team goal of planning for a normalized local educational experience for all students, as well as their own personal goals and opinions, even when the two appeared to be in conflict.

A second strategy for shaping such collaborative behavior was to have the inservice trainers attend team meetings in the role of outside technical assistants. They modeled "appropriate" verbal behaviors which supported task achievement

(e.g., summarizing or paraphrasing of statements) and the maintenance of positive relationships among group members (e.g., praising contributions, encouraging reluctant participants).

A third effective strategy was for the building principal or the special education administrator to intervene by modeling and supporting group members who demonstrated collaborative teaming behaviors. The administrator also could remind team members of the school district's commitment to the education of all students in the least restrictive environment and the legal ramifications of failing to allow for a normalized educational experience for a child.

## Issues Related to Model Implementation

### Which students do we serve?

Each school district or local school implementing the Homecoming model will need to develop its own eligibility criteria for referring a student to the local planning team. The eligibility criteria has a direct impact upon the number of referrals to the team and, thus, the amount of time the team will need to meet.

The eligibility criteria for referring a student has varied depending upon the size of the school, the numbers of potential referrals to the team, and the school district's long-range plan for providing services to all students within their local schools. For example, in the Southwest Vermont Supervisory Union, the initial mission of the planning teams was to transition students from early childhood/special education programs into local kindergartens. Therefore, planning team referrals were initially limited to this young population. In the Franklin Northwest Supervisory Union, students initially eligible for planning team services were those students returning to their home schools from regional programs and students currently in regular class programs who were in danger of being referred to special class programs. In the Franklin Central Supervisory Union (host district for a regional special education program), students initially eligible for referral were those students currently enrolled in the special class program, students enrolled in regular classrooms who were in danger of referral to a special class, and students graduating from early childhood/special education programs.

### Do we need a referral process?

It is important for the planning team to specify a referral process so that local school staff know how to gain access to the team's services. The team also needs to develop a referral process that will give them enough preliminary information to determine whether or not a student may be eligible for planning team services. At a minimum, this referral process should identify general information about the student (i.e., name, age, grade, teacher's name, parents' names and address) and describe the referral problem (e.g., student three years behind in reading, or student disrupts class). No referral should be ignored or returned to a teacher without some recommendation for action. If the team decides not to accept a referral, the team must justify its decision and recommend alternative actions (e.g., student should be referred to learning specialist, or school psychologist should evaluate student).

### Should we include the student's parents in planning?

In addition to having the greatest stake in their child's education, parents also possess a wealth of information about their child. These two qualities make parents a valuable resource to the local school. Unfortunately, the relationship between school staff and parents of students presenting intensive educational challenges oftentimes has been less than supportive. It, therefore, is the role of the local planning team to develop supportive relationships between the school and students' parents. The team not only should attempt to make parents feel comfortable when they meet but also should strive to demonstrate their appreciation of parents' involvement in the team planning process as critical to the development of the most appropriate educational plan for their child.

## How can the school staff promote active parent involvement?

At a minimum, parents need to be encouraged to use the home-school communication systems that already exist in all schools (e.g., parent/ teacher conferences, school open house night, or the PTO). It also is clear that the school can function as a referral agency, assisting parents to gain access to the checkerboard of community services that may benefit their child or themselves outside of the school (e.g., recreational services, family support and psychological services, respite care services, day care services). Whatever else parents and teachers agree may be helpful in promoting effective home-school partnership needs to be decided jointly at the local level.

## Should ESs provide direct services?

If ESs provide direct services to students, they have less time available to consult with school personnel and family members. On the other hand, shared responsibility for direct instruction can be a very effective and efficient way for an ES to demonstrate and monitor instructional programs on a regular basis.

## Who should be the case manager for challenging students?

Initially, it may take more time for ESs to train other educators (e.g., learning specialist, regular classroom teacher, or instructional aide) to function as the case manager for challenging students, than to be the case manager themselves. However, such a training model has the advantage of enhancing the skills of additional instructional personnel to promote quality programs for students presenting intensive challenges.

## Who should instructional aides work with?

Typically, instructional aides work with a designated set of students (e.g., students with severe handicaps or students with learning disabilities) or they work with all types of students, regardless of identified handicapping condition.

If all classroom instructional aides are trained to provide instruction to a broad range of students, the various special and general education professionals may be able to share these aides more readily and be more flexible in scheduling aides' time.

## What type of community awareness activities are needed?

One vehicle which has been very effective in enlightening community members, (e.g., school board members), to the potential benefits of home-school educational opportunities for challenging students has been a periodic (e.g., monthly or bi-monthly) newsletter which highlights the positive effects of a local school education. It also is a vehicle for publicly recognizing the contributions of teachers, administrators, students and community volunteers who make possible, on a day-to-day basis, the many integrated educational opportunities provided challenging students.

## What preparation do school staff need?

At a minimum, school personnel need training and coaching in how to function as a collaborative planning team. Additional training has been requested, particularly in the areas of classroom management and the management of disruptive behavior of individual students. Teachers also have frequently requested training to enable them to respond more effectively to the specific handicapping condition of a particular student (e.g., seizure management, handling and positioning, basic sign language).

### What preparation do non-handicapped students need?

Some schools have attempted to heighten nonhandicapped students' understanding of the impact of a handicapping condition upon a person's life and their acceptance of individuals with differences through such activities as a **handicapped awareness week** and the addition of a unit concerning handicapping conditions to the social studies or health curriculum. A very popular activity in elementary schools is to host a "Kids on the Block" puppet performance, at which students meet a number of puppets with various handicaps whom they can freely question about their handicaps.

### What is the appropriate teacher/student ratio for ESs?

Caseloads for ESs currently range from 10 to 20 students. Caseloads will depend upon a number of conditions existing within a school district including: the severity and diversity of students' handicapping conditions, the number of schools served and the travel distance between them, direct instruction responsibilities, other expertise available to serve students, and a host of other school-specific variables.

## Looking To The Future

No one correct answer exists to any of the questions posed above. There is no prescription which will work for all schools. The answers to the questions and the solutions to the problems which individual planning teams generate will be as unique as the characteristics and needs of their schools. Clearly, as time goes on and additional schools become directly involved in the education of their more challenging students, both problems and solutions will multiply. Since we learn from the experiences of others, the authors encourage those of you who do become involved in local planning teams to share your learnings with us and others. Such sharing will expand the knowledge-base regarding potential issues facing local planning teams and the strategies and solutions most effective in resolving these issues. ■

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## Appendix A. Parent Inventory

Student: _____

Person Interviewed: _____

Relationship to Student: _____

Interviewer: _____

Date: _____

Education Placement: _____

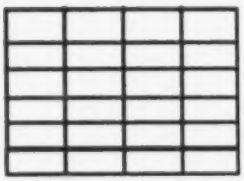
## I. HOME-LIVING ACTIVITIES

A. Here are some specific home living activities. Please indicate at what level your son/daughter participates and number the top three priority activities.

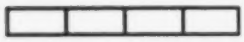
A. Participates independently
B. Participates with assistance
C. Does not participate
D. Number top three priorities

| | A | B | C | D |
|---|---|---|---|---|
| 1. Toileting | | | | |
| 2. Eating | | | | |
| a. Utensil use | | | | |
| b. Table Manners | | | | |
| c. Cleanup | | | | |
| 3. Dressing | | | | |
| a. Closures | | | | |
| b. Rate | | | | |
| c. Neatness | | | | |
| 4. Grooming | | | | |
| a. Washing | | | | |
| b. Bathing | | | | |
| c. Brushing Teeth | | | | |
| d. Hair care | | | | |
| e. Personal hygiene | | | | |
| 5. Clothing selection | | | | |
| a. Appropriate for weather | | | | |
| b. Clean | | | | |
| 6. Clothing care | | | | |
| a. Washes clothes | | | | |
| b. Dries clothes | | | | |
| c. Irons clothes | | | | |
| d. Stores clothes | | | | |
| e. Mends clothes | | | | |
| 7. Food and Meal Preparation | | | | |
| a. Prepares meals | | | | |
| b. Follows recipes | | | | |
| c. Cleans up after meals | | | | |
| d. Replenishes used items | | | | |
| e. Prepares shopping list | | | | |

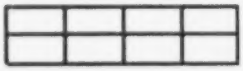
8. Cleaning and Maintaining areas of the house
   a. Dusting
   b. Vacuuming
   c. Sweeping
   d. Making beds
   e. Picking up
   f. Choosing/using cleaning products



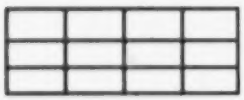
9. Turns lights on/off



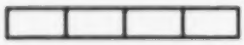
10. Opens/closes doors
    a. Locks/unlocks doors
    b. Answers door properly



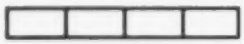
11. Uses telephone
    a. Uses phone directory
    b. Phone manners
    c. Emergencies



12. Cares for pets



13. Cares for plants in house/garden



14. Others _____

_____

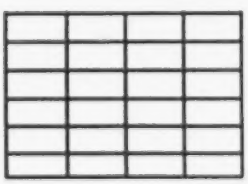
_____

_____

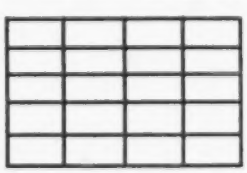
## II. GENERAL COMMUNITY FUNCTIONING

**A.** Here are some common activities in which people engage in the community. Please indicate at what level your son/daughter participates in each one and number the top three priority activities.

1. Shops in a store (general sequence)
   a. Makes a shopping list
   b. Identifies appropriate store by sign or by looking at items in window
   c. Walks appropriately around the store
   d. Locates items in the store by browsing following signs, or asking store personnel
   e. Compares prices of similar items
   f. Selects items for purchase
   g. Locates check-out register
   h. Waits in line
   i. Pays for items
   j. Leaves store with items



2. Uses public library
   a. Locates library
   b. Locates sections in library (main desk, appropriate reading section, card file, reference section)
   c. Applies for library card
   d. Selects books by browsing
   e. Uses card catalogue to select books
   f. Checks out books
   g. Returns book on time



3. Worships at church of choice
   a. Attends related church social event
   b. Atttends religious education classes related to church

4. Uses bank
   a. Uses checkbook
   b. Terminology
   c. Automatic teller

5. Goes to doctor/dentist office
   a. Expresses needs

6. Uses Community Services (e.g., health clinics, mental health services)

7. Eats in a restaurant
   a. Selects restaurant and enters
   b. Waits to be seated (if necessary)
   c. Orders from a menu
   d. Visits quietly while waiting to be served
   e. Uses proper table manners while eating
   f. Orders more food/dessert/drink as needed
   g. Pays for meal and leaves tip

8. Uses public restrooms
   a. Locates restroom
   b. Discriminates ladies & mens restroom by words, pictures, traffic
   c. Operates coin lock on toilet stall to enter
   d. Toilets appropriately
   e. Washes/dries hands

9. Buys personal items

10. Uses the post office.

11. Uses the laundromat.

12. Uses a pay phone.

13. Goes to barber/beauty shop.

14. Crosses intersections
   a. Identifies crosswalks.
   b. Crosses uncontrolled intersections
   c. Crosses partially controlled intersections.
   d. Crosses two stop sign intersections.
   e. Crosses four way stop sign intersections.
   f. Crosses intersections with 'walk/don't walk' signals.
   g. Crosses varied controlled intersections.

15. Travels in community
   a. Travels from home to school bus stop.
   b. Travels from bus stop to school.
   c. Travels to and from bus & varied services.

16. Rides in vehicles
    a. Rides bus to and from school.
    b. Rides bus to and from varied services.
    c. Travels to and from school or services using taxis.
    d. Travels to and from varied locations using trains.
    e. Rides a bicycle.

17. Others_____

**B. FOR YOUNGER LEARNERS**

Here are some common activities in which people engage in the community. Please indicate at what level your son/daughter participates in each one and if you feel any should be addressed in school.

A. Knowledge of function
B. Participates with parent cooperatively
C. Participates with parent uncooperatively
D. Does not participate
E. Would like to address

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1. Rider in car | | | | | |
| 2. Home of neighbor, relative or friend | | | | | |
| 3. Grocery store | | | | | |
| 4. Library | | | | | |
| 5. Shopping mall | | | | | |
| 6. Church | | | | | |
| 7. Bank | | | | | |
| 8. Doctor/dentist office | | | | | |
| 9. Restaurants | | | | | |
| 10. Public bathroom | | | | | |
| 11. Store | | | | | |
| 12. Post Office | | | | | |
| 13. Laundromat | | | | | |
| 14. Barber/beauty shop | | | | | |
| 15. Other_____ | | | | | |

## III. RECREATION LEISURE

**A.** We would first like to know how your son/daughter usually spends his/her time. Please indicate to what extent she/he participates in these activities. Then number your top three priority activities.

A. Participates independently
B. Participates with assistance
C. Does not participate
D. Top three priorities

| | A | B | C | D |
|---|---|---|---|---|
| 1. Play outdoor games (frisbee, darts, etc...) | | | | |
| 2. Exercise (jogging, biking, etc...) | | | | |
| 3. Play cards. | | | | |
| 4. Play board games. | | | | |
| 5. Watch TV. | | | | |
| 6. Listen to radio, records, tapes. | | | | |

7. Do crafts.
8. Play musical instrument.
9. Sew.
10. Collect items (stamps, coins, rocks, etc..)
11. Read magazines, books, newspapers.
12. Use personal computer.
13. Play home video games.
14. Do gardening.
15. Will join in on-going activities.
16. Initiates own leisure time activities.
17. Wins and loses gracefully.
18. Goes to home of neighbor, friend, relative.
19. Uses public library.
20. Attends movies, plays, concerts.
21. Goes bowling.
22. Goes to public beaches/swimming pool
23. Goes to the park.
24. Uses YMCA or other community recreational facilities.
25. Goes skiing.
26. Attends family vacations or outings.
27. Goes skating.
28. Attends arcades.
29. Attends parties, dances, social events.
30. Attends athletic events.
31. Uses excercise facility.
32. Follows smoking rules.
33. Understands and respects private property.
34. Knows and follows the law.
35. Others.

| | | | |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

## IV. VOCATIONAL

**C. What leisure activities would you like your son or daughter to learn to do in the community?** _____

_____

_____

A. What concerns do you have, if any, regarding your son/daughter's vocational needs? _____

_____

_____

B. Upon graduation from public school, in what types of work would you like to see him/her participating? _____

_____

_____

C. (For older learners only) What are your preferences for your son/daughter's occupation? Are there any activities from past vocational programs or work training experiences that you feel should be included in your son/daughter's school program? _____

_____

_____

D. Are there any occupations in which you object to your son/daughter participating? _____

_____

_____

E. Are there any jobs in which your son/daughter is particularly interested, either at home or in the community? _____

_____

_____

F. Are there any jobs which are particularly aversive or unpleasant to him/her?

_____

_____

_____

G. Follows Work Directions

1. Follows gestural directions
2. Follows modeled directions
3. Follows pictorial directions
4. Follows verbal directions
5. Follows written directions

| A | B | C | D |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

## V. TRANSITION

**(For Younger Learners)** Your child will most likely be moving from my class to _____class at _____within the next _____ _____years. Can you suggest any activities that might make the transition as easy as possible for him/her? _____

_____

## VI. PARENT TEACHER COMMUNI-CATION

**A.** Please indicate which methods of communicating with the teacher you would prefer to use and how often (Please Specify).

Use - yes or no
How often - Daily ? Weekly? Monthly? Other?

| | USE | | HOW OFTEN | | | |
|---|---|---|---|---|---|---|
| 1. Log book | | | | | | |
| 2. Informal phone contact | | | | | | |
| 3. Phone call night | | | | | | |
| 4. Newsletter | | | | | | |
| 5. Home Visits | | | | | | |
| 6. School Visits | | | | | | |
| 7. Parent Inventory | | | | | | |
| 8. IEP Report Card | | | | | | |
| 9. Social Integration Report Card | | | | | | |
| 10. Other | | | | | | |

B. Please place a check mark (x) before the kinds of information you would like to receive from and share with the teacher.

___ 1. Progress on IEP objectives
___ 2. Social interactions with nonhandicapped peers
___ 3. Classroom behaviors
___ 4. Medical information
___ 5. Input from support service providers (e.g., Occupational Therapist, Speech/Language Therapist, Physical Therapist)
___ 6. Daily classroom schedules and routines
___ 7. Special projects
___ 8. Community-based training programs
___ 9. Information about staff (teachers aides, peer tutors, etc.)
__10. Information about school
__11. Mainstream programs
__12. Peer tutor and peer buddy programs
__13. OTHER (please specify)

_____

_____

## VII. SURVEY OF PARENT INFORMATION AND SUPPORT NEEDS

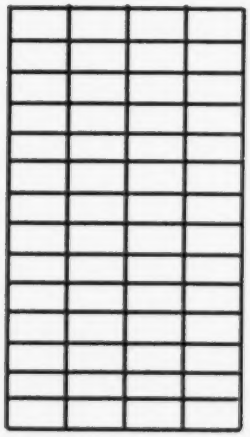
I would like to receive information or assistance in any of the following areas:

A. YES C. PRIORITY
B. NO D. RESOURCE

| AREAS: | A | B | C | D |
|---|---|---|---|---|
| Parent Support Group | | | | |
| Behavior Management | | | | |
| More Input into IEP Management | | | | |
| Community Services (e.g., ARC, VFF) | | | | |
| Managing Family Stress | | | | |
| Teaching Communication Skills | | | | |
| Teaching Sex Education | | | | |
| Speech and Language Therapy | | | | |
| Area Recreation Program | | | | |

## VIII. STUDENT PROFILE

Future Planning
Teaching Self-Care Skills
Teaching Domestic Skills
Teaching Community Skills
Counseling Services
Transportation Services
Respite Care Services
Legal Services
Advocacy Services
Employment Opportunities
Medical Concern
Residential Opportunities
Accessibility



1. Name of learner: _____

2. Age: _____

3. Major strengths: _____

_____

4. Major disabilities: _____

_____

5. Seizures: ☐Yes ☐No

If yes, type and frequency: _____

Medications and allergies: _____

6. Other pertinent medical problems: _____

_____

7. What are _____
(learner's name)

a. Major means of mobility: _____

_____

_____

b. Major means of communication: _____

_____

c. Major disruptive or inappropriate behaviors: _____

_____

d. Likes: _____ Dislikes: _____

_____ _____

_____ _____

_____ _____

_____ _____

8. What is _____ toileting procedure?
(learner's name)

9. What is _____ feeding procedure?
(learner's name)

10. Additional helpful hints and ideas including instructional materials and procedures, behavior management procedures:

11. What adaptive equipment does the learner use?

# Appendix B. Survival Skill Checklist

**EEE Teacher:** Ms. King
**Kindergarten Teacher:** Ms. Scott
**School:** Rural Elementary
**Class/Grade:** Kindergarten

**Directions for next grade teacher:**

For each skill listed, **X** whether the skill is expected of the majority of your students at the beginning of the school year, **O** those skills which are critical for success.

If there are OTHER skills not listed here that you feel are important, write them in the additional spaces provided.

**Directions for current teacher:**

Using the scoring system indicated in the KEY above, rate the learner's skill level for each of the 25 listed skills.

**KEY:**
I = Independent
P = NeedsPrompting
O = Cannot Do

A. Expected at beginning of the year.
B. Skill level of learner.

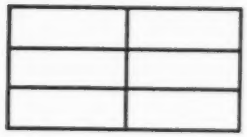
**SKILLS:**

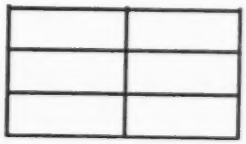
| | A | B |
|---|---|---|
| 1. Begins work within an appropriate time without extra teacher direction. | | |
| 2. Stays on task without extra teacher direction. | | |
| 3. Completes tasks within alloted time. | | |
| 4. Does not disrupt peers. | | |
| 5. Participates and/or follows task directions in a group. | | |
| 6. Answers teacher's questions while in group. | | |
| 7. Participates at appropriate time (e..g., waits for turn, waits to be recognized in a group). | | |
| 8. Locates materials and replaces or puts them in order when finished. | | |
| 9. Follows general rules and routines established in classroom. | | |
| 10. Compiles with simple directions. | | |
| 11. Follows 2-step directions. | | |
| 12. Follows 3-step directions. | | |
| 13. Follows directions provided at a previous time. | | |
| 14. Follows directions provided to the group. | | |
| 15. Engages in social/recreational activities at appropriate time. | | |
| 16. Initiates contact with peers. | | |
| 17. Follows rules established by a group. | | |

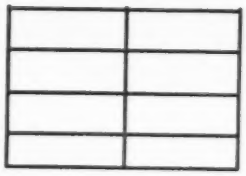
18. Shares, exchanges materials.
19. Settles minor disputes with peers.
20. Maintains social/recreational activity with peers for appropriate length of time.
21. Secures teacher/peer attention appropriately.
22. Asks for help, information or feedback.
23. Gives feedback to others, (comments on peers action or products).
24. Makes a choice or indicates a preference.
25. Other: _____

_____

_____







## Priority Skills in Need of Instruction

1. Simple directions
2. Asking for help
3. Making a choice

## Adaptations for Participation

1. Buddy to assist in following group directions
2.
3.

## Appendix C.
## Daily Schedule

Student: _____

Date: _____

| Time | Survival Skills & Educational Program Needs To Be Addressed | Activity | Location |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

| Person Responsible | Educational Arrangement and Adaptations | Functional Materials |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

## Appendix D. Student Class Activities

Student: _____

Teacher: _____

Date: _____

School: _____

| Time | Activity | Location | Arrangement | Materials |
|---|---|---|---|---|

# Appendix E.
# Classroom Activity Analysis Worksheet

| Classroom Activities | | | Appropriate for the Student? | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Activity | Pers. Resp. | Location/ Activity | As Is | | w/adapted materials | | w/adapted curr./goals | | w/personal assistance | | Specific Adaptations |
| | | | YES | NO | YES | NO | YES | NO | YES | NO | |
| | | | | | | | | | | | |

| Alternative Activities for Students | | | | Skills in Need of Training |
|---|---|---|---|---|
| Activity | Location/Grouping | Pers. Resp. | Materials | |
| | | | | |

## Appendix F.
## Observation Sheet

**Task Skills**

| | | | | | | |
|---|---|---|---|---|---|---|
| 1. Information and Opinion Giver | | | | | | |
| 3. Information and Opinion Seeker | | | | | | |
| 5. Direction Giver | | | | | | |
| 7. Summarizer | | | | | | |
| 9. Timekeeper | | | | | | |
| 11. Energizer | | | | | | |
| Other | | | | | | |
| Other | | | | | | |

**Relationship Skills**

| | | | | | | |
|---|---|---|---|---|---|---|
| 2. Encourager of Participation | | | | | | |
| 4. Tension Reliever | | | | | | |
| 6. Communication Helper | | | | | | |
| 8. Evaluator of Emotional Climate | | | | | | |
| 10. Observer of Process | | | | | | |
| 12. Active Listener | | | | | | |
| Other | | | | | | |
| Other | | | | | | |

Reprinted from Human relations and your career: A guide to interpersonal skills, by David W. Johnson. Englewood Cliffs, NJ: Prentice-Hall, Inc., 1978.

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